

**Family Resources Survey**  
**April 2007 – March 2008**  
**Guide to Question Changes**

***April 2007***

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## 1 Summary

This booklet describes the main changes to the FRS questionnaire from April 2007.

The 2007-8 survey year is the second in the new contract from April 2006 to March 2009 which NatCen and ONS won in September 2005.

The changes have been made to meet the changing information needs of policy makers for example to reflect the changes in benefit recipient rules. Changes have also been made to improve the survey by actioning suggestions made by interviewers in the last survey year, via the Field Report, telephone and e-mail and also through suggestions made during briefings.

When at all possible, suggested changes are made and these are acknowledged in the Guide to Changes. Sometimes it is not possible to act on suggested changes, for example if the suggested change will:

- create inconsistencies with other surveys, for example where the change will affect a harmonised question;
- increase the length of the questionnaire;
- conflict with information needs of FRS data users;
- have a negative effect on other parts of the survey.

Experienced interviewers are also involved in testing the program before the start of the survey year and during the survey year to monitor how well the changes have been incorporated.

Thank you to all the interviewers who worked on the 2006-7 FRS. I hope you continue to enjoy working on the survey throughout the new survey year.




### 1a. Note on the Guide to Changes

Details of new questions and changed questions for 2007/8 survey year will be described. Questions removed from the questionnaire will also be shown but will be crossed through to clearly indicate that they are no longer asked.

As a quick visual guide to the type of change made icons have been included throughout this document.

#### Key of icons

Changes made to questions will be identified by the following icons:

Icon	Description
	Removed
	Added
	Changed

The icons below have been added to the Guide to Changes to help you when looking for information to answer points of clarification.

Icon	Description
/	Important: Please Note
+	Check with respondent
4	Include this information in the answers recorded
6	Exclude this information from the answers recorded

#### 1b. What's gone?

In a bid to reduce the average FRS questionnaire length, the DWP consulted with FRS users about which FRS questions they used in their analysis and which ones were not used and therefore could potentially no longer be asked. They found through doing this audit that only the questions asked in alternate years (in the rotated blocks) on vehicle ownership, NHS, and travel to work were put to a more limited use and so were candidates for removal. Otherwise, the question audit found that every question asked on the FRS is accounted for, and used in further analysis or policy decisions!

The rotated blocks have been removed from the questionnaire in order to reduce the questionnaire length.

#### 1c. What's changed?

- ◆ **Televisions**
  - Questions moved to Benefit Unit block after deprivation questions.
  - Preamble removed.
  - Questions reworded to ask how many TV sets household has.
- ◆ **Educational Maintenance Allowance**
  - Question routing change.
- ◆ **Tax Credit**
  - Two new questions included to check whether respondent has ever received tax credits or received tax credits at all in 2007/8 financial year.
- ◆ **Lone Parent benefits**
  - Work-related Activity Premium (WRAP), a new benefit for lone parents, has been added to question Ben5Q.
- ◆ **Maternity pay**
  - Maternity pay is being extended to 39 weeks for women expecting babies on or after 1<sup>st</sup> April 2007.
- ◆ **Previous employment**
  - New questions added to record the month and year the respondent started working for previous employer, if has been with current employer for less than 12 months.
- ◆ **Childcare**
  - The childcare section has been restructured to improve flow of questions where there is more than one child in the household.
  - Interviewer prompt added to establish whether respondent has considered all types of childcare in their answer.
- ◆ **Benefits in kind – question ExpBen**
  - Two new categories 'mobile phones' and 'vouchers' added.
  - Description of smart pensions added to showcard and screen.
- ◆ **Request to participate in follow up studies**

- Question wording reduced.


## 1d. Additional information and instructions

- ♦ **Childcare**
  - Description of nursery class and reception class provided
- ♦ **Civil Partnerships**
  - amended instruction on coding relationships with 'in-laws' in civil partnerships
- ♦ **Helpscreens at Pensions Questions**
  - Helpscreen information condensed so that it can be referred to more easily during interview
- ♦ **Benefits in kind**
  - Helpscreen information updated to detail what should be included for new categories.

## 2 Removal of rotated question blocks

For the 2007-08 survey year ALL of the rotated question blocks will be cut from the FRS.

### 2a. Questions on travel to work Block: Qtravel

Removed 


#### **TtwFar**

~~Now there are some questions about travel to work.~~

~~About how far do you have to travel to your usual place of work?~~

~~Interviewer: Give one-way distance or average of outward and return journeys~~


- ~~1. Work at, or from  
— home/live at work~~
- ~~2. Varies – no usual place of work~~
- ~~3. Under 1 mile~~
- ~~4. 1 but under 2 miles~~
- ~~5. 2 but under 5 miles~~
- ~~6. 5 but under 10 miles~~
- ~~7. 10 but under 15 miles~~
- ~~8. 15 but under 20 miles~~
- ~~9. 20 but under 25 miles~~
- ~~10. 25 but under 50 miles~~
- ~~11. 50 but under 100 miles~~
- ~~12. 100 miles and over~~

Removed 

#### **TtWFrq**

~~On how many days of the week do you usually travel to your usual place of work.~~

~~Interviewer: If weekly pattern varies, give average to 1 decimal place.~~

Removed 

#### **TtWMod**

~~How do you usually travel to work?~~

~~Interviewer: Probe for main method.~~

- ~~1. car/van (include minibus/works van)~~
- ~~2. motorbike /moped/scooter~~
- ~~3. bicycle~~
- ~~4. bus (include coach, private bus)~~
- ~~5. railway train~~
- ~~6. London underground train~~
- ~~7. Light railway/tram~~
- ~~8. walk~~
- ~~9. taxi~~
- ~~10. other~~

Removed ✂

### **NiTWMod**

#### NORTHERN IRELAND VARIATION

How do you usually travel to work?

Interviewer: Probe for main method.

1. ~~car/van (include~~  
~~minibus/works van)~~
2. ~~motorbike/ moped/~~  
~~scooter~~
3. ~~bicycle~~
4. ~~bus (include coach,~~  
~~private bus)~~
5. ~~train~~
6. ~~walk~~
7. ~~taxi~~
10. ~~other~~

Removed ✂

### **TtWPss**

Do you have a season ticket, bus pass or travel card?

Removed ✂

### **PssAmt**

How much does the season ticket/bus pass/travel card cost?

Removed ✂

### **Pssdate**

And how long is it valid for?

1. 1 week
2. 1 month
3. 3 months/school term
4. 6 months
5. 1 year
6. More than 1 year
7. Unlimited
8. Other

Removed ✂

### **OthDate**

Please specify...

Interviewer: Enter number of days, weeks or months covered, or start and end dates.

Removed ✂

### **Fare**

How much does the journey by (as appropriate) [bus/train/tube/light rail/taxi]... cost each time?

If you share the taxi with others please only include your share of the fare

Removed ✂

### **OneWay**

Is that the one-way or return fare?

Removed ✂

### **TtWPay**

Do you pay for ALL, SOME, OR NONE of the costs of taking the [car or van/motorcycle] to work?

1. Pay ALL
2. Pay SOME
3. Pay NONE

Removed ✂

### **TtWCode**

1. Respondent is passenger and contributes money to others
2. Respondent is driver and receives money from passengers/employer etc
3. Some other arrangement (neither of the above)

Removed ✂

If **TtwCode** is coded 1:

**TtWCost**

How much do you pay per week?

If **TtwCode** is coded 2:

Removed ✂

**TtWRec**

How much do you receive per week?

## 2b. Questions on prescriptions, dentist and hospital treatment, eye tests and glasses

(Block: Welfare)

Removed ✂

**NHS**

In the past 4 weeks, have any of you ... Read out...

Code all that apply... (enter at most 5 codes)

1. ... received something on prescription?
2. ... visited the dentist for a NHS examination or treatment?
3. ... had an eyesight test?
4. ... purchased glasses or contact lenses?
5. ... or been to hospital for NHS treatment?
6. (None of these)

Removed ✂

**Per**

Who received the items on prescription?

Who visited the dentist?

Who had the eyesight test?

Who purchased the glasses or contact lenses?

Who went to hospital?

Removed ✂

**Prit**

How many items did [name] receive during the past 4 weeks?

Removed ✂

**Free**

Were the items free of charge or did [name] have to pay?

1. Free of charge
2. Had to pay

Was the examination or treatment free of charge or did [name] have to pay?

1. Free of charge
2. Had to pay

Was the sight test free of charge or did [name] have to pay?

1. Free of charge
2. Had to pay

Removed ✂

**WhyFree**

What are the main reasons for that being free of charge?

1. Entitled through a social security benefit (IS, JSA, Tax Credits)
2. Because they have a charges certificate HC2
3. Due to a medical condition (or a relative's medical condition)
4. Because they required strong 'complex' lenses
5. Expecting a baby
6. Other reason

Removed ✂

**Voucher**

For the glasses/contact lenses, was a NHS voucher used to help with the cost?

1. Yes
2. No

Removed ✂

**Trav**

Did [name] get any money back at the hospital, for travel costs?

Removed ✂

**WhyTrav**

What are the main reasons for getting money back for travel costs?

1. Entitled through a social security benefit (IS, JSA, Tax Credits)
2. Because they have a charges certificate HC2
3. Due to a medical condition (or a relative's medical condition)
4. Because they required strong 'complex' lenses
5. Expecting a baby
6. Other reason

Removed ✂

**Xintro**

Has anyone else had anything on prescription ...

Has anyone else visited the dentist ...

Has anyone else had an eyesight test ...

Has anyone else purchased glasses or contact lenses during the past 4 weeks?

**2c. Questions on vehicle use and ownership**

(Block: QVehicle)

Removed ✂

**UseVcl**

Do you, or any members of your household, at present own or have continuous use of any motor vehicles?

Interviewer: Include company vehicles — if available for private use

0. None
1. One
2. Two
3. Three
4. Four or more

Removed ✂

**TypeVcl**

SHOW CARD Q

I would now like to ask about the [first/second etc] vehicle. Is it...

1. a car
2. a light van
3. a motor cycle,
4. or some other motor vehicle?

Removed ✂

**PrivVcl**

Is the [car/light van/motorcycle/other motor vehicle]...

1. privately owned,
2. or is it a company vehicle?

Removed ✂

**AnyMore**

Do (any of) you at present own or have continuous use of any more motor vehicles?

### 3. Household Schedule

#### 3a. TV Questions

##### (Block: BTeleV)

The television questions have moved position in the questionnaire. They will now be asked after the deprivation questions in the benefit unit schedule. As the deprivation questions ask about things people have or don't have, we hope that the TV questions will fit in better than it has been reported that they do at the moment in the household block.

/ Although the television questions will now be asked in the Benefit Unit schedule they will only be asked **once** for **Benefit Unit 1** as we only want to know about television ownership in the **household**.

Questions about TV ownership are asked because people pay for TV licences as part of their household expenses. Certain groups of people have discounts to their TV licence fee e.g the visually impaired. TV licence fees are also reduced for people who have a black and white television set. We have continued to ask about black and white TVs because a substantial number of households still have black and white TVs (the 2005/6 FRS figures show that 1347 households had one Black and White TV and 197 households had more than one Black and White TV). The amounts paid for TV licences need to be accounted for in the calculation of household income. Therefore we need to ask about both colour and black and white televisions. These questions help give an accurate picture of respondents' relative household incomes.

In addition to changing the position of the television questions, we have also re-worded them so that they now ask how many colour TVs and how many black and white TVs the household has, instead of asking whether they have a colour TV or a black and white TV. Interviewers reported that asking people whether they had a television often seemed bizarre when the interviewer and respondents were seated in front of a large television that dominated the room! It is hoped that the changes remove this situation.

Removed ✂

##### **TellyPre**

~~The next questions ask whether you have a television set within your household.~~

Removed ✂

##### **ConTV[1]**

~~Does your household have any of the following items?  
...a colour TV set?~~

~~INTERVIEWER: Include items stored but in working order, and items under repair.~~

- ~~1. One only~~
- ~~2. more than one~~
- ~~2. none~~

Removed ✂

##### **ConTV[2]**

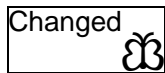
~~Does your household have any of the following items?  
...a black and white TV set?~~

~~INTERVIEWER: Include items stored but in working order, and items under repair.~~

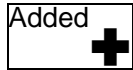
- ~~1. One only~~
- ~~2. more than one~~

~~3. none~~

## **2007/8 questions**



**ROUTING INSTRUCTION:** *{Ask after Debt in block IAfford.Inc of first Benefit Unit respondent only}*

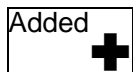


**NumTV[1]**

**How many colour TV sets does your household have?**

**INTERVIEWER:** Include items stored but in working order, and items under repair.

1. One only
2. more than one
3. none



**NumTV[2]**

**How many black and white TV sets does your household have?**

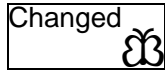
**INTERVIEWER:** Include items stored but in working order, and items under repair.

1. One only
2. more than one
3. none

### 3b Relationship grid (Civil Partnerships)

There has been one change in the Interviewer Instructions regarding Civil Partnerships.

/ The relationship to parents of a civil partner's partner should be recorded as 'mother-in-law' and father-in-law', in the same way as relationships for married couples. Previously, the parents of a civil partner had been coded as 'no relation' to the other partner.



#### R

Ask or record [PERSON NAME'S] relationship to [OTHER PERSON IN HHLD].

1. spouse or civil partner
2. cohabitee
3. [Son/Daughter] (incl. adopted / legal dependant)
4. step-[Son/Daughter]
5. foster child
6. [Son/Daughter]-in-law
7. [Father/Mother] (or guardian)
8. step-[Father/Mother]
9. foster parent
10. [Father/Mother]-in-law,
11. [Brother/Sister] (incl. adopted)
12. step-[Brother/Sister]
13. foster [Brother/Sister]
14. [Brother/Sister]-in-law
15. grand-[Son/Daughter]
16. grand-[Father/Mother]
17. other relative,
18. or other non-relative?

## 4. Benefit Unit Schedule

### 4a Educational Maintenance Allowance (EMA)

#### (Block: BEduc1)

A minor routing amendment has been made to the Educational Maintenance Allowance (EMA) questions so that respondents are not asked the period that their EMA payment covered if they do not know how much their payment was.

*IF (PAge IN [16..20]) AND (AnyEd = Yes))*

#### **EMA**

Do you receive an Educational Maintenance Allowance (EMA) as part of the new Government scheme?

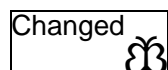
1. Yes
2. No

*(IF EMA = Yes)*

#### **EMA Amt**

How much did you receive last time, including any bonuses?

0.00..99997.00



*(If EMA Amt = 0.01...99997.00)*

#### **EMAPd**

How long did that cover?

### 4b Tax Credits

#### (Block: BTaxCrd1 and BNTaxCrd)

FRS data users have found a mismatch between FRS data and administrative records regarding Tax Credit receipt, whereby the FRS reports lower figures for Tax Credit receipt. This discrepancy is believed to be related to different definitions of Tax Credit receipt employed in FRS questions and adopted in analysis of administrative records. The FRS asks about Tax Credit receipt in terms of payments received. Administrative records include all those with a positive entitlement to tax credits regardless of whether they receive any payment. For example, those who did not receive a payment because their tax credit entitlement had been reduced to zero to repay an overpayment in the previous financial year would not necessarily be recorded in receipt of tax credits in the FRS but would be in administrative records.

In order to account for those with a zero payment for tax credits on the FRS two additional questions have been added after TaxCred. One question will pick up families whose tax credit payments have been reduced to zero in the current year due to an overpayment earlier in the year. The second question will pick up families whose tax credit payments have been reduced to zero due to an overpayment which occurred in the previous year.

The question TCZero has been removed as it is replaced by the new tax credit questions. If the respondent has not received a payment or has received notification that their payment will be £0 (zero pounds) code TaxCred as 3 'None of these'. The

respondent will then be asked why they are not receiving any payments at the moment at the question TCRepay.

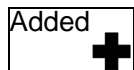
### **TaxCred**

#### **SHOW CARD H1**

Are you at present receiving any of these tax credit payments in your own right. Please include any lump sum payments under £105 received in the last year?

1. WTC
2. CTC
3. None of these

*If TaxCred=3 'None of these'*



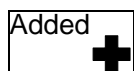
### **TCEver**

#### **SHOWCARD H1**

**Have you ever received any tax credit payments?**

1. WTC
2. CTC
3. None of these

*If TCEver=1 'WTC' or TCEver=2 'CTC'*



### **TCThsYr**

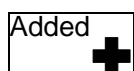
#### **SHOWCARD H1**

**Have you received any tax credit payments since April 2007?**

1. WTC
2. CTC
3. None of these

*If (TaxCred=3 'Never received tax credits') OR (TCThsYr=1 'WTC in this financial year' or TCThsYr=2 'CTC in this financial year' or TCThsYr=3 'No tax credits in this financial year')*

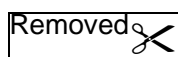
*(Respondent not getting Tax Credits at the moment but did in the last financial year or in a previous year).*



### **TCRepay**

**Why are you not receiving any tax credit payments at the moment?**

1. Repaying an overpayment from earlier this year [will only appear on screen if TCThsYr=1 or TCThsYr=2]
2. Repaying an overpayment from previous year
3. Not completed application forms
4. Income too high
5. Not eligible for other reason
6. Other



### ~~TCZero~~

~~Can I just check, did you receive a Tax credit award of £0 (zero pounds) because you are...~~

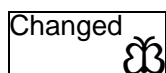
- ~~1. making repayments because of an overpayment of Tax Credit~~
- ~~2. not eligible for payment of Tax Credit~~
- ~~3. SPONTANEOUS - Other~~

#### 4c Lone Parent benefits

##### (Block: BBen5Q)

A new benefit for lone parents is being piloted in 7 New Deal Plus pilot districts from April 2007.

The Work-Related Activity Premium (WRAP) provides a £20 per week payment for lone parents for up to six months in addition to Income Support. WRAP will be made available to those in the 7 pilot areas who have been on qualifying benefits (IS, JSA or IB) for at least six months, whose youngest child is aged 11 or over, and who engage in some agreed work-related activity. WRAP will replace the existing Work-search Premium (WSP) in April 2007, but WSP is retained as a category at question Ben5Q as it could be relevant to those receiving this payment in the 6 months prior to April 2007.



##### Ben5Q

SHOW CARD J4

In the **last 6 months**, have you received any of the things shown on this card, in your own right?

INTERVIEWER: Record age-related payments not received with winter-fuel payment as code 9.

1. 'Extended payment' of Housing Benefit/rent rebate, or Council Tax Benefit (4 week payment only)
2. Bereavement Payment– paid in lump sum
3. Child Maintenance Bonus/ Child Maintenance Premium
4. Lone Parent's Benefit Run-On/Job Grant
5. Work-Search Premium
6. In-Work credit
- 7. Work-related Activity Premium**
8. Return to work payment
9. Any National Insurance or State benefit not mentioned earlier
10. None of these

#### 4d Maternity Pay

Maternity pay policies are due to change, and the FRS will be updated to reflect this.

Statutory Maternity Pay (SMP), Maternity Allowance (MA) and Statutory Adoption Pay (SAP) are currently paid for a maximum of 26 weeks (the 06/07 rate is £108.85 per week). This will be extended to 39 weeks for women expecting babies on or after 1st April 2007.

/ The checks and amounts will be changed in 2007 to take into account these changes for those respondents receiving Maternity pay, Adoption pay or Maternity Allowance.

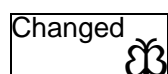
**(Block: BMainJob)**

FRS data is being used to inform policy decisions on pension provision, made as part of the DWP's Pension Reform agenda. The pensions analysts need to work out how any proposed pension schemes will affect people in the workplace. One key question is whether there should be a waiting period (of up to 6 months) before employees are eligible to belong to an employer pension scheme. The concern is that people who change their job often may not get the chance to join a pension scheme.

So that the impact of a waiting period to join a pension scheme can be assessed using FRS data the pensions analysts need to know how long people stay in their jobs, so they can see how many people would miss out on an employer pension.

We already record on the FRS how long people have been with their current employer. The FRS also asks those who have been working for less than 6 months what their previous situation was (WatPrev). The routing has been extended to this question to a 12 month reference period. The question WatPrev has been changed so that those who had previously been self-employed can be identified. As this is a significant change to the question it has been renamed as WrkPrev.

If the respondent started work for their current employer less than 12 months ago they will be asked the month and year they started working for their previous employer. By using the information on when started work for current employer and previous employer an indication of how quickly people change jobs can be gained from the FRS.

**WorkYr**

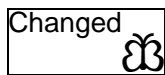
In which year did you start working continuously for your current employer / as a self-employed person?

1901..**2008**

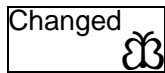
**WorkMth**

and which month was that?

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December



**ROUTING INSTRUCTION:** *If with current employer for less than **12 months**.*



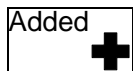
**WrkPrev (previously named WatPrev)**

Were you in paid employment or self-employed immediately before you started this current job?

Include holiday from previous employment if less than 3 months.

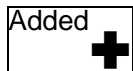
1. In paid employment
2. **self employed**
3. Not in paid employment

**ROUTING INSTRUCTION:** *If WrkPrev=1 'in paid employment / self-employed before current job'.*



**PrevYr**

**In which year did you start working continuously for your previous employer / as a self-employed person?  
1901..2008**

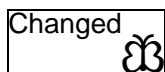


**ROUTING INSTRUCTION:** *If PrevYr=Response.*

**PrevMth**

**and which month was that?**

1. **January**
2. **February**
3. **March**
4. **April**
5. **May**
6. **June**
7. **July**
8. **August**
9. **September**
10. **October**
11. **November**
12. **December**



**ROUTING INSTRUCTION:** *If WatPrev =3 'NoEmp (not in paid employment)'*

**WatDid**

SHOWCARD G2

What was the main reason why you were not in paid employment at that time?

INTERVIEWER: If the respondent is not working because they are doing voluntary work, travelling, having a year out or career break then this should be coded as didn't need employment.

1. Unemployed/looking for work
2. Student /training
3. Looking after the family / home / children
4. Caring for a disabled or elderly person
5. Temporarily sick or injured
6. Long-term sick or disabled
7. Didn't need employment
8. Retired
9. Made redundant

**(Block: BChCare)****Change in order of questions**

The childcare section has been restructured in an attempt to reduce some of the perceived repetition in the childcare questions, especially where there is more than one child in the household receiving the same type of care.

/ In the restructure childcare section, instead of asking first what type of childcare Fred receives and who looks after him and then asking which type of childcare Jane receives and who looks after her, the new questionnaire will ask Fred and then Jane what type of care they receive and then ask for Fred and then Jane who looks after them.

It is anticipated that this change will improve the flow of the childcare questions.

***The following is an example of how the restructured childcare section will work in the 2007/08 questionnaire, using some of the questions from the section. The examples are based on an interview with a respondent who has two children: Max aged 4 and Jemima aged 10.***

**Disp**

Interviewer: *"The next questions are about childcare for your child(ren). This includes all types of childcare such as playschool or nursery school or a childminder as well as relatives or friends who look after your child(ren)."*

**ChAtt**

Interviewer: *"At any time during the seven days ending Sunday the (7<sup>th</sup> April), did Max attend any of the places shown on this card?"*  
 Code all that apply  
 Count all after school activities as 'After school clubs'.  
 This includes all study support or recreational activities after school hours.

Respondent: *"Day nursery"*

**ChAtt**

Interviewer: *"At any time during the seven days ending Sunday the (7<sup>th</sup> April), did Jemima attend any of the places shown on this card?"*  
 Code all that apply  
 Count all after school activities as 'After school clubs'.  
 This includes all study support or recreational activities after school hours.

Respondent: *"Breakfast/After school club"*

**CTrm**

Interviewer: *"(Can I just check) for Max was that week in term time or was it a school holiday..."*

Respondent: *"Term time"*

**CTrm**

Interviewer: *"(Can I just check) for Jemima was that week in term time or was it a school holiday..."*

Respondent: *"Term time"*

### ChPeo

Interviewer: *And during those seven days (ending Sunday the (7<sup>th</sup> April)) were there any other people who looked after Max?  
Other than resident parent/guardian, and staff contact whilst at places previously mentioned.*

Interviewer: ensure that respondent has included all types of paid and unpaid childcare, including childcare give by non-resident parents.

Respondent: 2 “non-resident parent”

### ChPeo

Interviewer: *“And during those seven days (ending Sunday the (7<sup>th</sup> April)) were there any other people who looked after Jemima?  
Other than resident parent/guardian, and staff contact whilst at places previously mentioned. “*

Interviewer: ensure that respondent has included all types of paid and unpaid childcare, including childcare give by non-resident parents.

Respondent: 2 “non-resident parent”

### Registrd

Interviewer: MAX  
*“Is the day nursery or creche registered or approved?”*

Respondent: “Registered”

### EmplProv

Interviewer: MAX  
*“Is the childcare with the day nursery or creche provided by your employer?”*

Respondent: “No”

Previously, as you will be aware, all of these questions would be asked of Max and then all asked of Jemima.

### Description of nursery class and reception class

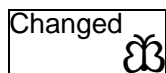
A description of reception class and nursery class has been added to the helpscreens at questions ChInf and ChPri to help respondents differentiate between a reception class and a nursery class.

Nursery class and reception class are defined as follows:

A **Nursery class** is attended by 3 to 5 year olds before attendance at a reception class.

A **Reception class** takes children who are either almost 5 years or are 5 years old.

/ Reception class is attended before year 1 of primary school.



### ChInf

(Can I just check) at the infant’s school, was [child’s name] in a

1. Reception class?
2. Nursery class?
3. None of the above

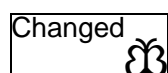
In addition, extra guidance on what to include in the 'other benefits in kind' category received from FRS users at HM Revenue and Customs (HMRC) has been included in the helpscreen.

**11. ANY OTHER BENEFITS IN KIND: the any other benefits in kind category should include:**

**4**any good or service, not covered in the other categories at ExpBen, that is provided by an employer (or paid for by an employer on someone's behalf) and which is made available for personal use.

A short description of a smart pension has also been added to the showcard (and the screen for interviewer reference) in order to help respondents determine whether they are contributing to such a pension scheme. A smart pension is defined as follows:

"Smart pension or salary sacrifice pension arrangement (where the employee agrees to a cut in gross pay and in return the employer pays the employee's pension contribution)."



## **ExpBen**

### **Showcard G5**

**In the last 12 months**, that is since [date], have you received, or made use of any of the things on this card from your present employer?

Interviewer: Code all that apply. Company vehicles do not include motorbikes/scooters.

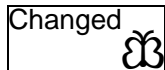
1. Company car
2. Company van
3. Fuel for private use
4. Business mileage payments
5. Travel and business trip expenses
6. Smart pension **or salary sacrifice pension arrangement (where the employee agrees to a cut in gross pay and in return the employer pays the employee's pension contribution)**
7. Medical or dental insurance for self or family
8. Workplace nursery
9. Childcare vouchers / employer contracted childcare
- 10. Mobile phone**
- 11. Vouchers**
12. Any other benefits in kind
13. None of these

## **4h      Helpscreens at Pensions questions**

**(Block: BPens1 and BPens2)**

/ For the 2007-08 questionnaire we have shortened the helpscreen information to make them easier to use during an interview.

The descriptions are detailed here for information. The descriptions of different pensions is also available in the 'Guide to Pensions' supplied as part of the FRS field materials.



## ChkNoP

INTERVIEWER: The respondent seems NOT to have a pension which is being contributed to is this correct?

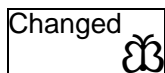
Exclude AVCs and FSAVCs - which are top-ups to pensions not pensions in their own right.

**{Help Screen information**

**AVCs (Additional Voluntary Contribution) allows a scheme member to make an extra payment to a pension. For many occupational pension schemes an AVC is a separate pension which on retirement is paid in addition to the main scheme benefits.**

**FSAVCs (Free Standing Additional Voluntary Contribution) are a pension plan where the scheme member can make extra contributions that are separate from the occupational pension scheme.}**

1. No pension
2. Does have a pension



## EmpPen

Help <F9>

SHOWCARD I1

Thinking about the pension scheme run by your employer, which of the pension arrangements described on this card best describes your employer pension?

INTERVIEWER: If respondent has a stakeholder pension run by their company this should be coded as stakeholder and NOT occupational. This question only refers to employer-based pensions. Exclude personal pensions.

**{Help Screen information**

**Code 1: Only include pensions if employer or employee contributions are being paid in now, or will be in future.**

**Code 2: Superannuation schemes should be treated as a company or occupational pension (code 2). Employees may be a member of an employer's pension or superannuation scheme on a voluntary basis. Some employers require employees to be members of their scheme unless they 'opt out' whilst others require them formally to 'opt in' before they can become members.**

**Code 4: Respondent should be routed as EmpPen=2**

### **Company Pensions**

**A company pension is gained as a result of salaried employment, and is sometimes referred to as an occupational or superannuation pension.**

**Employees are generally referred to as members of the Scheme. The scheme is generally paid for by the Employer who makes contributions into a fund. In many schemes the employee may also be required to contribute.**

### **Group Stakeholder Pensions**

**Like personal pensions, Stakeholder Pensions are sold by insurance companies, banks and building societies, as well as by some trade unions. As with Group Personal Pensions, employers can make an**

arrangement with a pension provider and offer their employees a group stakeholder pension scheme.

There are some differences between stakeholder pensions and other types of personal pensions.

SHPs have to meet certain standards set by the Government to make sure they offer value for money, flexibility and security:

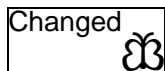
- the charges are capped;
- there are low minimum payments;
- they are more flexible than many other private

pension schemes - you can choose when and how often you pay into the scheme and there are no penalties if you miss a payment; and

- other people, as well as an employer, can pay into a stakeholder pension on your behalf. That means that partners or other family members can help you to save for your retirement.}

1. A group personal pension (these are personal pensions arranged by an employer for a group of employees)
2. A company or occupational pension scheme
3. A group stakeholder pension (these are stakeholder pensions arranged by an employer on behalf of employees - the employer may or may not contribute to such a pension)
4. None of these

**ROUTING INSTRUCTION:** { IF PensDV=1 AND EmpArr=3 }



**ChkdPn**

Help <F9>

Can I just check, is it possible that your pension is a group personal pension or a group stakeholder pension?

INTERVIEWER: Earlier at EmpPen, the respondent said that they did NOT pay into a group personal or group stakeholder pension run by their employers.

**{Helpscreen information**

**Employer sponsored group stakeholder**

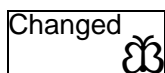
Like personal pensions, Stakeholder Pensions are sold by insurance companies, banks and building societies, as well as by some trade unions. As with Group Personal Pensions, employers can make an arrangement with a pension provider and offer their employees a group stakeholder pension scheme.

There are some differences between stakeholder pensions and other types of personal pensions.

**Group Personal Pensions**

A Group Personal Pension (GPP) is a series of individual personal pensions provided by a single life insurance company, but organised by an employer. Both the employer and the employee can contribute to a group personal pension.}

1. Yes
2. No
3. Don't know



## EPCon

Help <F9>

Who contributes to your employer [PensionType] - you, or your employer, or both of you?

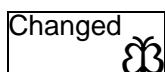
INTERVIEWER: Code one answer only.

### {Helpscreen information

**SHPs have to meet certain standards set by the Government to make sure they offer value for money, flexibility and security:**

- the charges are capped;
- there are low minimum payments;
- they are more flexible than many other private pension schemes - you can choose when and how often you pay into the scheme and there are no penalties if you miss a payment; and
- other people, as well as an employer, can pay into a stakeholder pension on your behalf. That means that partners or other family members can help you to save for your retirement.}

1. Respondent only
2. Employer only
3. Both contribute
4. Neither)



## EPGOV

Help <F9>

In the last 12 months, has any money been paid into this employer pension as a rebate of part of your National Insurance contributions because you are contracted out of SERPS/ S2P?

INTERVIEWER: SERPS is the State Earning Related Pension Scheme. S2P is the Second State Pension introduced in April 2002.

### {Helpscreen information

#### **State Pensions**

**The pension paid from the state can be divided into essentially two layers.**

#### **The Basic State Pension**

**The Basic State Pension provides a basic flat-rate level of pension, rising year on year with the rise in price inflation and is available to all those who have paid a sufficient number of years of National Insurance contributions.**

#### **Additional State Pension (S2P / SERPS)**

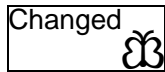
**The second layer is an earnings related pension and effectively provides a top-up pension based on an individuals level of earnings over their career. Unlike the Basic State Pension, the amount of pension the individual receives from the Additional State Pension is dependent upon the amount the person earned, and hence the total National Insurance contributions they paid across their career.**

#### **Contracting Out**

**Contracting out is a mechanism that permits individuals to give up their right to an Additional State Pension and either pay a reduced level of National Insurance in the case of an Occupational Pension scheme or receive a rebate from the Inland Revenue in the case of Personal/Private or Stakeholder Pensions. Instead of paying into the State Earnings Related Pension Scheme (SERPS) or into the State Second Pension (S2P), employees can join a contracted out**

**occupational pension scheme (if the employer operates one) or take out an appropriate personal pension.}**

1. Yes
2. No



### **PersPen**

Help <F9>

Thinking of the pension you arranged yourself, do you have a personal pension or a stakeholder pension or both?

INTERVIEWER: Code all that apply.

#### **{Helpscreen information**

##### **Personal pensions**

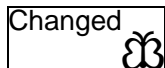
**Introduced in 1988, a personal pension is a kind of pension that people set up for themselves, with a pension provider such as a bank, life assurance company or building society. It is entirely your own, which means you can continue to contribute to it if you move jobs. Personal**

**pensions are the most common pension arrangement for people who are self-employed.**

##### **Stakeholder pensions**

**Introduced in 2001, Stakeholder pensions (SHPs) are a special type of low-charge personal pension. SHPs are suitable for people who are self-employed, moderate and low earners, and those who do not have an income of their own but can afford to save for a pension (e.g. women on a career break). SHPs can also be set up for children.}**

1. Personal pension
2. Stakeholder pension



### **StakeP**

Help <F9>

Now I have some questions about possible pension arrangements.

Are you paying contributions into a stakeholder pension fund?

Do not include pensions where you are receiving payments.

INTERVIEWER: Only record 'Yes' if contributions are paid into the pension.

Do not record if money gained from a pension.

#### **{Helpscreen information**

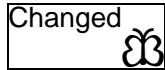
##### **Stakeholder pensions**

**Introduced in 2001, Stakeholder pensions (SHPs) are a special type of low-charge personal pension. SHPs are suitable for people who are self-employed, moderate and low earners, and those who do not have an income of their own but can afford to save for a pension (e.g. women on a career break). SHPs can also be set up for children.}**

1. Yes
2. No

**(Block: BEnd)**

The follow-up question has been edited to make it as short as possible, while still saying everything we need to get across to the respondent. The question has been amended again for the new survey year because there was a feeling amongst interviewers that the question was too long and wordy.



**FollowUp**

Sometime in the future there may be a follow-up study to this. Such a study would be agreed with the Department for Work and Pensions. Would you be willing to be contacted again, so either we or another approved social research organisation can carry out the study?.

We may not contact you again but, if we do, you will still be free to decide whether you wish to participate in any follow-up study.

1. Yes
2. No

## 5. Details of changes to showcards

2007-2008	2006-2007	Question name	Source code file	AMENDMENT (in bold)
A1	A	'TypeEd'	<i>HHGrid</i>	KEEP
A2	B	'NatId'	<i>ethnic</i>	3 cards for England, Wales and Scotland NB: NI version of this
A3	C	'Ethgrp'	<i>ethnic</i>	KEEP
B1	D	'Tenure'	<i>owns1 address.</i>	NB: NI version of this
B2	E	'Landlord'	<i>rents</i>	NB: NI version of this
B3	F	'TenType'	<i>rents</i>	2 versions England & Wales and Scotland
B4	G	'OthWay'	<i>rents</i>	KEEP
B5	H	'RMPur'	<i>owns1</i>	KEEP
B6	I	'MortType'	<i>owns1</i>	KEEP
B7	J	'EndwPrin'	<i>owns1</i>	KEEP
B8	K Not numbered	'MorAll'	<i>owns1</i>	KEEP
B9	L Not numbered	'MorAll'	<i>owns1</i>	KEEP
B10	M	'SerInc'	<i>rents</i>	KEEP
B11	N	'OthPur'	<i>owns1</i>	KEEP
B12	O Not numbered	'CTDisc' 'CT25D50D'	<i>countax</i>	KEEP BUT NB: NOT FOR NI
B13	P	'Charge'	<i>owns2</i>	KEEP
C1	Q	'Chatt'	<i>chcare</i>	KEEP
C2	R	'ChPeo'	<i>chcare</i>	KEEP
C3	S	'ChInKnd'	<i>chcare</i>	KEEP
D1	T Not numbered	'NeedHelp', 'GiveHelp'	<i>qcare</i>	KEEP
D2	U	'Hour'	<i>qcarer</i>	KEEP
D3	V	'HowLng'	<i>qcare</i>	KEEP
E1	W	'DisDif'	<i>ihealth</i>	KEEP
E2	X Not numbered	'Rstrct'	<i>ihealth</i>	KEEP
F1	Y	'Train'	<i>icurst</i>	KEEP
F2	Z	'NewDType'	<i>icurst</i>	KEEP
F3	AA	'RetReas'	<i>icurst</i>	KEEP
G1	BB	'EType'	<i>ijobdes</i>	KEEP
G2	CC	'WatDid'	<i>ijobdes</i>	KEEP
G3	DD	'InclPay', 'InclPay1'	<i>iempjob</i>	KEEP

2007-2008	2006-2007	Question name	Source code file	AMENDMENT (in bold)
G4	EE Not numbered	'HHInc'	<i>iempjob</i>	KEEP NB: NI version of this
G5	FF	'ExpBen'	<i>iempjob</i>	<b>CARD AMENDED</b> <b>1. Smart pension</b> <b>{DEFINITION ADDED TO CATEGORY}</b> <b>2. Mobile phones and vouchers</b> <b>{2 NEW CATEGORIES ADDED}</b> 1. Company car 2. Company van 3. Fuel for private use 4. Business mileage payments 5. Travel and business trip expenses <b>6. Smart pension or salary sacrifice pension arrangement (where the employee agrees to a cut in gross pay and in return the employer pays the employee's pension contribution)</b> 7. Medical or dental insurance for self or family 8. Workplace nursery 9. Childcare vouchers / employer contracted childcare <b>10. Mobile phone</b> <b>11. Vouchers</b> <b>12 Any other benefits in kind</b>
G6	GG Not numbered	'OwnSum'	<i>iselfjob</i>	KEEP
H1	HH	'TaxCred'	<i>itaxcred</i>	KEEP
H2	II	'WTCLum'	<i>itaxcred</i>	KEEP
H3	JJ	'CTCLum'	<i>itaxcred</i>	KEEP
I1	KK	'EmpPen'	<i>ipension</i>	KEEP

2007-2008	2006-2007	Question name	Source code file	AMENDMENT (in bold)
I2	LL	'EmpArr'	<i>ipension</i>	KEEP
I3	MM	'EPLong' 'PPDat' 'SPDat'	<i>ipension</i>	KEEP
I4	NN	'EpType'	<i>ipension</i>	KEEP
J1	OO	'Ben1Q'	<i>ibenef1</i>	KEEP
J2	PP	'Ben2Q', 'B2QFut'	<i>ibenef1</i>	KEEP
J3	QQ	'Ben3Q', 'B3QFut'	<i>ibenef1</i>	KEEP
J4	RR	'Ben4Q'	<i>ibenef1</i>	KEEP
J5	SS	'Ben5Q'	<i>ibenef</i>	<b>CARD AMENDED</b>  <b>1. Work-related Activity Premium {NEW CATEGORY ADDED}</b> 1. 'Extended Payment' of Housing Benefit / rent rebate or Council Tax Benefit (4 week payment only) 2. Bereavement Payment (paid in lump sum) 3. Child Maintenance bonus / Child Maintenance Premium 4. Lone Parent's Benefit Run-On / Job Grant 5. Work Search Premium 6. In-Work Credit <b>7. Work-related Activity Premium</b> <b>8. Return to Work Credit</b> <b>9. Any National Insurance or State Benefit not mentioned Earlier</b>
K1	TT	'GOVPay'	<i>benblock</i>	KEEP

2007-2008	2006-2007	Question name	Source code file	AMENDMENT (in bold)
K2	UU	'Ben7Q'	<i>ibenef4</i>	KEEP
L1	WW	'AnyPen'	<i>iothinc1</i>	KEEP
L2	XX	'Royal'	<i>iothinc1</i>	KEEP
L3	YY Not numbered	'PropRent'	<i>iothinc1</i>	KEEP
L4	ZZ	'Allow'	<i>iothinc2</i>	NB: NI version of this
L5	AAA	'OddJob'	<i>iothinc2</i>	KEEP
M1	BBB	'AddHol' 'AdDmel' 'AdShoe' 'AdDDec' 'AdDIns'	<i>afford</i>	KEEP
M2	CCC	'AdDMon' 'AdepFur' 'Af1'	<i>afford</i>	KEEP
M3	DDD	'AddHol' 'AdDmel' 'AdShoe' 'AdDDec' 'AdDIns' 'AfDep2' 'AdDepLes'	<i>afford</i>	KEEP
M4	EEE	'AdDmon' 'AdepFur' 'Af1'	<i>afford</i>	KEEP
M5	FFF	'CDepHol' 'CDepBed' 'CDepEqp' 'CDepCel'	<i>afford</i>	KEEP
M6	GGG	'CDepSum' 'CDepLes' 'CDepTEa' 'CPlay' 'CDepTrp'	<i>afford</i>	KEEP
M7	HHH	'Debt'	<i>afford</i>	KEEP

2007-2008	2006-2007	Question name	Source code file	AMENDMENT (in bold)
N1	III	'Accounts'	<i>iadint</i>	KEEP
N2	JJJ	'Invests'	<i>iadint</i>	KEEP
N3	KKK	'OtInvA'	<i>iadint</i>	KEEP <b>(2 cards)</b>
N4	LLL	'GivCFnd'	<i>ichint</i>	KEEP
N5	MMM	'Totsave'	<i>ichint</i>	KEEP
N6	NNN	'TotSav'	<i>isave</i>	KEEP
N7	OOO Not numbered	'IncChnge'	<i>isave</i>	KEEP
N8	PPP	'IncHiLo'	<i>isave</i>	KEEP
N9	QQQ	'IncOld'	<i>isave</i>	KEEP
N10	RRR	'NSAmt'	<i>isave</i>	KEEP

## 6. Index of question names

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