Student Income and Expenditure Survey 2011/12

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Date: August 2014
Prepared for: Department for Business, Innovation & Skills (BIS)
Technical Report

1.1 Background to the study

This is a report on the research methods used in the Student Income and Expenditure Survey 2011/12 (SIES 2011/12) carried out on behalf of the Department for Business, Innovation and Skills (BIS) and the Welsh Government (WG).

SIES is a large-scale comprehensive survey that collects detailed information on the income, expenditure and debt levels of higher education (HE) students.

The 2011/12 survey is the latest in a series of surveys carried out at approximately three year intervals. However, the methodology used in the latest 2011/12 survey is very different from the previous surveys, the last of which was run in 2007/08. In previous waves of SIES, the survey consisted of a 60 minute face-to-face interview, while in 2011/12 a 25 minute web/ telephone survey was used.

SIES 2011/12 will provide a baseline for assessing the impact of the greatest changes in student finance for some considerable time, changes which will be introduced in September 2012 for those starting HE in the 2012/13 academic year.

1.1.1 Collaboration

As for 2007/08, the National Centre for Social Research (NatCen) and the Institute for Employment Studies (IES) conducted the 2011/12 SIES in close collaboration. NatCen had overall responsibility for the delivery of the survey, lead responsibility for the sample design, questionnaire design, fieldwork with students and data preparation. IES had lead responsibility for collecting sample data from institutions, and data analysis and report writing.

1.1.2 Overview of the methodology

The SIES 2011/12 technical report gives detailed descriptions of all aspects of the survey and data collection, including the development phases. However, in order to give an overview of the research process, the key activities within the main-stage of the survey are outlined here, with the overall project timetable shown in Table 1.1 overleaf.
Table 0.1: Project timeline

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>September – October 2011</td>
<td>Start of the contract</td>
</tr>
<tr>
<td></td>
<td>Design of sampling plan</td>
</tr>
<tr>
<td></td>
<td>Development of interview questionnaire and expenditure diary (for pilot)</td>
</tr>
<tr>
<td></td>
<td>Initial contact with institutions</td>
</tr>
<tr>
<td>November 2011 – January 2012</td>
<td>Sample for pilot drawn</td>
</tr>
<tr>
<td></td>
<td>Cognitive testing of main questionnaire and diary</td>
</tr>
<tr>
<td></td>
<td>Dress rehearsal pilot of interview and diary</td>
</tr>
<tr>
<td></td>
<td>Recruitment of institutions for main-stage</td>
</tr>
<tr>
<td></td>
<td>Sample for main-stage drawn</td>
</tr>
<tr>
<td></td>
<td>Interview questionnaire and expenditure diary finalised for main-stage</td>
</tr>
<tr>
<td>February 2012 – June 2012</td>
<td>Main-stage fieldwork: web and telephone interviews with students and diary completion</td>
</tr>
<tr>
<td>July – September 2012</td>
<td>Data editing, coding and checking</td>
</tr>
<tr>
<td></td>
<td>Preliminary analysis of the dataset</td>
</tr>
<tr>
<td>October – December 2012</td>
<td>Main analysis and England report drafting</td>
</tr>
<tr>
<td>England report completed</td>
<td>July 2013</td>
</tr>
<tr>
<td>May – July 2013</td>
<td>Wales report drafting</td>
</tr>
<tr>
<td>Wales report completed</td>
<td>December 2013</td>
</tr>
</tbody>
</table>

Source: NatCen/IES 2011/12

The main-stage of fieldwork was carried out between February and June 2012, broadly corresponding to the Spring and Summer terms in the academic year. As the student spending diary was intended to capture term-time spending only, the diary was not available to students for four weeks over the Easter holiday period. (A similar approach was trialed in the dress-rehearsal pilot, where the diary was closed to students over the Christmas holidays and was re-opened at the start of term in January.)

**Sampling - selection of institutions**

NatCen selected a number of institutions in England and Wales based on Higher Education Statistics Agency (HESA)\(^1\) figures about the student populations at each.

---

\(^1\) Skills Funding Agency data were used to provide FEC information.
Letters were sent from BIS and WG to the Vice Chancellors and Principals at selected institutions containing information about the research and an invitation to take part. IES made individual contact with institutions, explained their role in sampling and secured their agreement to take part.

**Sampling - selection of students**

NatCen identified the numbers of full-time and part-time students to be sampled from each institution taking part (numbers differed by type and country of institution). The sample of students in their second year and above was drawn directly from HESA records. Once random selection of second year plus students was accomplished, institutions were given a list of the unique identification codes (HUSID) of the sample of students in their second year of study or above and asked to provide the research team with contact details for each of these.

For students in their first year, HESA records were not available at the time when the sample was drawn (December 2011). For these students, IES instructed institutions about the numbers of students to sample and helped institutions to do this using random selection. Institutions then produced a list of sampled students containing names and addresses.

In previous waves of SIES, an opt-in procedure was used, whereby students first had to opt into the study before their contact details were handed over from institutions to the research team at NatCen. In SIES 2011/12, this opt-in stage was not necessary as students are now asked to sign a declaration when enrolling with their college or university. This declaration (detailed below) gives students the opportunity to opt out, in a blanket fashion, from participating in any research.

> “Your contact details may be passed onto survey contractors to carry out the National Study Survey and surveys of student finances, on behalf of the education organisations listed below. These organisations will use your details only for that purpose, and will then delete them.”

Extract from HESA Student Collection Notice which HESA require all HEIs to provide their students

As students were able to choose not to participate in SIES at this stage, a separate opt-in procedure was not deemed necessary.

**Fieldwork and data collection**

Students selected for the study were sent an advance letter containing information about the study and invited to take part (no further input from institutions was required). A few days later they were contacted by email to remind them about the study and provide them with a web link to the questionnaire and a unique password that enabled them to access an online survey.
Students received up to four emails and one text message to remind them to complete the main questionnaire. If they did not fill out the questionnaire online (or only partially completed it), they were contacted by a telephone interviewer and given the opportunity to complete the survey over the phone.

On completion of the main survey questionnaire, students were asked to fill out a seven day online spending diary. They received an email and text message every day for seven days to remind them to do so. Students completing the diary were sent a £20 Amazon voucher to thank them for their help with the study.

1.2 Sampling

1.2.1 Background and overview of the sampling methodology

In total, the survey was designed to include 75 higher education institutions (HEIs) (65 in England and 10 in Wales), 45 further education colleges (FECs) (40 in England and 5 in Wales) and the Open University (OU), with the hope that 53 English HEIs, 10 Welsh HEIs, 20 English FECs and 5 Welsh FECs would agree to take part. In terms of student numbers, the aim was to achieve over 3,500 responses from undergraduate students in HE institutions, 2,500 full-time and 1,000 part-time (including Open University students), and a smaller number of interviews with those studying HE in an FE institution.

1.2.2 Selecting and approaching institutions and students

The target numbers of institutions for the study were 53 English HEIs, 10 Welsh HEIs, 20 English FECs, 5 Welsh FECs and the OU. Within institutions separate samples were selected across a number of student groups: medics; English-domiciled full-time and part-time; and Welsh-domiciled full-time and part-time.

**English HEIs**

For English HEIs our aim was to select a total of 9,291 students from 53 institutions, with the 9,291 divided as:

- 2,450 part-time students;
- 968 Welsh domiciled full-time students;
- 4,993 English domiciled full-time students; and
- 880 medical students

Students in each of these groups were to be selected with as close to equal probability as possible (at least for the non-medic groups), but with each institution contributing a total sample of 155, or of 195 in institutions with a medical school.

Of the 130 HEIs in England, 65 were selected for the survey with the expectation that 53 would agree to take part. Institutions were selected from a stratified (sorted) list: sorted firstly by Government Office Region, then by whether pre- or post-1992, then by whether the institution intended to charge more than £6000 for any of its undergraduate provision,
and finally by weighted size. A cumulative size column was also constructed, and a sampling interval calculated by dividing the total (cumulative) size of all institutions by the number of institutions to be selected. The 65 HEIs were then selected systematically from the sorted list using a random start (i.e. if \( n \)= the random start and \( k \)=the sampling interval, then the institutions containing the \( n \)th student, the \( n+k \)th student, the \( n+2k \)th student etc were selected).

**Welsh HEIs**

For Welsh HEIs, the aim was to select 4,361 students overall, divided as:

- 1,296 part-time students;
- 1,807 Welsh-domiciled full-time students;
- 1,218 English-domiciled full-time students; and
- 40 medical students.

All ten Welsh HEIs were selected for the survey. In previous years equal numbers of students were selected from the 10 Welsh HEIs. This was seen as quite inefficient due to the fact that the HEIs were selected with the same probability rather than with probability proportional to their size. In 2011/12 students in Welsh HEIs were therefore selected proportionate to their numbers in each institution.

**English FECs**

There were 154 English FECs with eligible students. Of these, those with less than 100 eligible students were excluded, leaving 103 FECs. This is in line with previous waves of SIES: it means that 33% of FECs are excluded, but just 3.2% of students. From the 103 FECs remaining, 40 were selected for the survey, with the expectation that 20 would agree to take part. 93 students were selected from each institution with the aim of selecting 2,473 full-time and 1,234 part-time students.

The selection followed a very similar procedure to that for English HEIs. The 40 were selected using stratification and with probability proportional to weighted size.

**Welsh FECs**

All eligible Welsh FECs were selected for the survey and all eligible students within these institutions were selected due to the low number of students in these institutions.

**The OU**

A separate sample of around 1,000 part-time students studying at the OU was obtained directly from the OU. The sample was designed to closely resemble the part-time student population eligible for the study, rather than to represent the overall OU population. Our sample was drawn from the group of students who fulfilled all of the following criteria: those working towards a named qualification (either a first degree, foundation degree,
PGCE or ITT, Dip HE, Cert HE, HND or HNC); those working towards a qualification worth at least 30 credits which equates to 25 per cent FTE); and resident in England or Wales only. The sample included new and continuing students, and was drawn from those with October 2011 starts. It should be noted that the sample is therefore not representative of OU students as whole.

1.3 Questionnaire and diary of spending development

All students – whether at a higher education institution (HEI), further education college (FEC) or the Open University – were surveyed using the same methods. First, they were asked to complete a main survey, which was conducted either online (as a self-completion questionnaire; see Appendix 1) or over the phone with an interviewer. All students were then asked to complete a seven-day diary of spending after the interview. The spending diary was only available online; see Appendix 2.

The combination of the main questionnaire and the seven-day diary of spending meant that all areas of income and spending could be monitored. For example, the questionnaire was able to pick up on larger and more memorable spending such as rent, travel, childcare, maintenance and holidays whilst day-to-day spending on items such as food and entertainment was recorded in the diary of spending.

The 2011/12 wave of the Student Income and Expenditure Study used a 25-30 minute web or telephone questionnaire for the main survey. This is in contrast to the 60 minute face-to-face questionnaire that was used in previous waves of the survey. As a result of the change in mode, the SIES questionnaire had to be shortened considerably. A summary of the amendments made for the 2011/12 study is provided below:

- Questions on tuition fees were simplified for SIES 2011/12. The SIES 2007/08 sample included both ‘old-system’ and ‘new-system’ students and the questionnaire had to accommodate both groups. In 2011/12, only ‘new system’ students were included, meaning that the section of the questionnaire relating to tuition fees was shorter.

- The section of the questionnaire on Higher Education Income (for example, income from loans and grants) was updated slightly so that questions related to the funding available to students in the 2011/12 academic year. Some funding opportunities available in 2007/08 no longer existed in 2011/12, so a couple of questions had to be deleted.

- Questions on other earnings were simplified and fewer questions were asked over all. For example, questions about the money that students received from parents were streamlined in comparison with the 2007/08 version of the survey.

- Similarly, questions on expenditure were simplified and fewer questions were asked in relation to the 2007/08 questionnaire. For example, in 2007/08, respondents received more probing about categories of spending than was possible in 2011/12, given the shorter length of the survey.
• All questions were adapted from the face-to-face mode to work as a web and telephone survey. Questions had to be simple enough for students to understand without the aid of an interviewer (as the web survey was a self-completion questionnaire). Moreover, in 2007/08 showcards were used (for example to prompt students to remember items of spending), while this was not possible in 2011/12, due to the change in methodology.

The questions included in the 2011/12 spending diary were the same as in 2007/08.

1.3.1 Development of questionnaire and diary of spending

Initial development

The 2007/08 questionnaire was taken as the starting point for the 2011/12 development. However, as detailed above, the questionnaire had to be changed considerably to reflect the change in methodology from a face-to-face interview to a web and telephone mode.

Cognitive testing

Cognitive testing was used to test the SIES 2011/12 questionnaire. There were two phases of testing. Firstly, before the main-stage of cognitive testing, NatCen researchers undertook six qualitative interviews with students (five full-timers and one part-timer), with the aims of testing that the questionnaire was generally workable and of identifying priorities for cognitive testing. These interviews took place in November 2011. Interviews lasted around one hour. In the first half of the interviews, the respondent was asked questions over the phone, for example, about their tuition fees and loans and about aspects of their expenditure; in the second half, the respondent was asked (face-to-face) about how they had found the questions/survey more generally.

The main-stage of cognitive interviewing took place between 23rd November and 8th December. Three interviewers (two based in England and one in Wales) conducted six interviews each. Interviews were held with both full-time and part-time students, and with both first year students and those in other years.

Cognitive interviewers tested an online version of the questionnaire and diary. Respondents were asked to fill in the online questionnaire and diary, thinking aloud as they did so. They were also probed at certain questions to find out more about how they had arrived at their answers. The cognitive tests had two key objectives:

• Firstly, to test the wording of new questions: Did the questionnaire accurately measure students’ income and expenditure? In what ways could questions be improved?

• And secondly, to test the layout of the online questionnaire and diary: Were the questionnaire and diary as user-friendly as possible? Were they easy to navigate? What improvements could be made?

A number of changes were made to the questionnaire as a result of the cognitive testing.
• The wording of certain questions was changed to make their meaning clearer to respondents.

• Further instructions were added to some questions. For example, in response to the questions on money received from parents, it was found that some respondents forgot to mention all they had been given. Consequently, further guidance was added to these questions to prompt respondents about the type of things that should be reported.

• Several amendments were made to the layout of the main questionnaire. For example, where some questions seemed a bit repetitive to respondents, bold text was used to help differentiate one question from the next.

• Some of the instructions in the spending diary were clarified and the layout was amended (for example, by moving question and answer boxes closer together).

Dress rehearsal pilot

The dress rehearsal pilot took place between 6th and 23rd December 2011. The pilot tested both the main questionnaire and the seven-day online spending diary. The objectives of the pilot were as follows:

• To test response rates to the main questionnaire and the diary of spending.

• To check which mode students use to complete the questionnaire and to review how well the mixed web and telephone mode worked in practice.

• To test the length of the questionnaire: Reducing the length of the original questionnaire was a key challenge for this project. We aimed to reduce the length of the existing questionnaire from 60 minutes to 25 minutes. A key objective of the pilot was to check that the questionnaire had been reduced sufficiently in length.

• To review contacting procedures: Respondents were contacted at different times and in different ways to encourage them to take part in SIES 2011/12, including via advance letter, email and text message. The pilot helped us test whether the contacting procedures were appropriate.

The sample was provided to us directly by four universities: Derby, York St John, University College London and Lancaster. Respondents were in different years of study and studying a range of different courses, both full-time and part-time. There were a total of 400 cases in the pilot sample.

The pilot involved testing both the main questionnaire and the seven-day spending diary. As in the main survey, respondents were able to fill in the main questionnaire online or over the phone. The diary was only available for completion online.

The results of the pilot were as follows:
Out of a sample of 400, 151 responses were received to the main questionnaire, representing a response rate of 38%. 14 per cent of respondents refused to take part in the study, while no contact was made with 13 per cent of respondents. In the case of 30 per cent of respondents, contact was made – but interviewers were unable to secure an interview during the fieldwork period.

Sixty per cent of those respondents who completed a main questionnaire (91 students) went onto fill out a spending diary.

In terms of mode, 97 (64%) questionnaires were completed fully online and 43 (28%) were completed fully over the phone. Eleven (7%) were started online, but completed over the phone.

The average length of the phone interviews was 36 minutes, while the average length of the online survey was considerably shorter at 26 minutes.

The contacting procedure for both the main survey and spending diary was found to work well in the dress rehearsal pilot.

Several wording changes were made to the questionnaire and additional instructions were included at some questions.

1.3.2 Briefing and interviewer numbers

Forty-five telephone interviewers were briefed on 20th and 21st January 2012, in half-day briefings. These briefings took place at NatCen’s dedicated telephone unit in Brentwood, Essex. The briefings covered the background to the survey, the sample of respondents, use of the study documents (for example, the advance letters and reminder letters and emails), approaching the sample, an overview of the questionnaire content and the use of the seven-day diary of spending.

1.3.3 Contact procedures

Students were informed about the study via an advance letter. The letter introduced the study, emphasised its importance and provided respondents with a unique access code to logon to the study website and complete the survey.

An email was then sent out to students providing them with information about the study, the unique access code and a web link to the survey. This email was followed with a text message (where we had students’ mobile numbers) to alert respondents to the fact they had been sent an email about the study – and encouraging them to complete it.

Telephone contacts began soon after sending the email. Interviewers telephoned respondents who had not yet completed the interview online, and attempted to arrange an appointment either to complete the interview over the phone, or a reminder call to do the survey online if they preferred.
Welsh students were given the opportunity to complete the survey in the Welsh language but all students completed the survey in English.

At the end of the interview students were asked whether they would be willing to complete the seven-day online spending diary. If they agreed, they were given a web address and login details to complete the diary online. They were send a reminder email and text message on each of the seven days.

### 1.3.4 Incentives
Respondents received a £20 Amazon voucher for completing all seven days of the diary. They did not receive an incentive for just completing the main questionnaire, or for only partially completing the diary.

### 1.3.5 Fieldwork period and monitoring
Fieldwork began on 20th February 2012. Fieldwork was originally scheduled to end in the week commencing the 26th March 2012. However, the timetable was extended until 18th June 2012 for various reasons.

Firstly, there was a slight delay to launching the questionnaire. This was due to the fact that the development of the questionnaire and testing of both the web and telephone modes took longer than anticipated.

Secondly, accessing the sample from institutions and processing and editing the data was also a lengthy process. Much of the sample had not been received from institutions by the original cut-off point. Institutions were given extensions to their deadlines, and this in turn impacted on the fieldwork timetable.

Thirdly, the response rate was low among part-time students. The fieldwork period was extended into June for this group only and telephone interviewers specifically targeted part-time students to try to boost response.

### 1.3.6 Fieldwork period and monitoring

**Interview response**

Table 1.2 shows the final response rates for the main questionnaire. Overall, 36 per cent of the issued sample of students was interviewed. A further nine per cent of students were found to be ineligible when the interviewer contacted them or when they entered their details at the start of the questionnaire (for example, they had dropped out of their course).

**Table 0.2: Final productive and unproductive interview rates**
Table 1.3 shows the response rates by type of institution and student. Response was lower for part-time students than for full-time students. It was also lower for older students (more of whom tended to be part-time), and older groups also had higher rates of ineligibility. Response was higher for students at English or Welsh higher education institutions (HEIs), compared with those studying at further education colleges (FECs) or the OU.

Table 0.3: Interview response rates, by institution and type of student

<table>
<thead>
<tr>
<th></th>
<th>Response rate (%)</th>
<th>Ineligibility rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>35.7%</td>
<td>9%</td>
</tr>
<tr>
<td>English HEI</td>
<td>36.5%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Welsh HEI</td>
<td>37.9%</td>
<td>10.2%</td>
</tr>
<tr>
<td>FEC</td>
<td>33.5%</td>
<td>9.0%</td>
</tr>
<tr>
<td>OU</td>
<td>24.2%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Full-time</td>
<td>39.1%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Part-time</td>
<td>27.5%</td>
<td>17.7%</td>
</tr>
<tr>
<td>Male</td>
<td>35.9%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Female</td>
<td>25.2%</td>
<td>10.0%</td>
</tr>
</tbody>
</table>

Source: NatCen/IES SIES 2011/12
<table>
<thead>
<tr>
<th>Age Group</th>
<th>Response Rate (%)</th>
<th>Ineligibility Rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 20</td>
<td>45.6%</td>
<td>2.6%</td>
</tr>
<tr>
<td>20-24</td>
<td>35.6%</td>
<td>5.7%</td>
</tr>
<tr>
<td>25 or over</td>
<td>27.4%</td>
<td>18.4%</td>
</tr>
</tbody>
</table>

Base: Students sampled for SIES 2011/12.

Source: NatCen/IES SIES 2011/12

### 1.3.7 Diary response

Table 1.4 shows the level of diary returns. In total, 52 per cent of respondents who completed a full interview also returned a diary. All diaries were completed online.

#### Table 0.4: Final productive and unproductive diary rates

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>% of (full) interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieved main interviews</td>
<td>5007</td>
<td>100%</td>
</tr>
<tr>
<td>Diary received</td>
<td>2625</td>
<td>52.4%</td>
</tr>
</tbody>
</table>

Base: Students sampled for SIES 2011/12.

Source: NatCen/IES SIES 2011/12

The level of diary returns varied by different groups (Table 1.5). Compared with those studying at English and Welsh HEIs (55.9%), respondents at Further Education Colleges were less likely to complete diaries (35.9%), as were those studying at the Open University (45.7%). Moreover, while 56 per cent of full-time students completed a diary, this proportion fell to 38 per cent among part-time students. Those aged 25 and over (39.3%) were less likely those aged under 20 (57.6%) and those aged 20 to 24 (55.3%) to complete a diary.

#### Table 0.5: Diary returns, by institution and type of student

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>100%</td>
</tr>
<tr>
<td>English HEI</td>
<td>55.9%</td>
</tr>
<tr>
<td>Welsh HEI</td>
<td>55.9%</td>
</tr>
<tr>
<td>FEC</td>
<td>35.9%</td>
</tr>
<tr>
<td>OU</td>
<td>45.7%</td>
</tr>
<tr>
<td>Full-time</td>
<td>56.2%</td>
</tr>
<tr>
<td>Part-time</td>
<td>38.4%</td>
</tr>
<tr>
<td>Male</td>
<td>51.8%</td>
</tr>
<tr>
<td>Female</td>
<td>53.2%</td>
</tr>
<tr>
<td>Age at the start of the academic year:</td>
<td></td>
</tr>
<tr>
<td>Under 20</td>
<td>57.6%</td>
</tr>
<tr>
<td>20-24</td>
<td>55.3%</td>
</tr>
<tr>
<td>25 or over</td>
<td>39.5%</td>
</tr>
</tbody>
</table>
Base: Students sampled for SIES 2011/12.
Source: NatCen/IES SIES 2011/12
Spending levels by timing of diary completion

As noted above, the main-stage of fieldwork was carried out between February and June 2012, but the student spending diary was intended to capture term-time spending only so the diary was unavailable to students for four weeks over the Easter holiday period.

The majority of English domiciled students who completed the spending diary started their diary week after Easter (83 per cent). Although part-time students appeared to be somewhat more likely to complete the diary after Easter this difference was not statistically significant.

The activities undertaken by students in the summer term can be quite different from the spring term, as studies in the summer term tend to focus on revision for exams rather that lectures. This could have an impact on the levels of spending recorded before and after Easter. To check whether this was the case, we compared average spending for each of the diary items included in the reporting by whether the diary week began before or after Easter.

Average spending among English domiciled students varied significantly by the timing of diary completion on a small number of the raw (unadjusted) diary items\(^1\). For the overall spending categories reported on in the analysis, which have been adjusted for joint financial responsibility with a partner, where relevant, combined with sources of expenditure reported in the questionnaire significant differences by the timing of diary completion emerged in the areas of personal spending, household goods, travel and total participation costs, with higher costs on average reported in each area of spending by those students who completed their diary in the summer term. However, these differences were largely explained by differences in the types of students who completed their diaries in the summer term. When controlling for whether the students were on a full-time or part-time course, significant differences in spending by timing of diary remained only for two spending categories.

Reported personal spending and spending on household goods was higher for both full-time and part-time English domiciled students who completed their diaries in the summer term (Table 1.6).

Table 0.6: Diary spending differences by timing of diary completion and whether full-time or part-time course

<table>
<thead>
<tr>
<th></th>
<th>Before Easter</th>
<th>After Easter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal spending</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>1,571</td>
<td>1,901</td>
</tr>
<tr>
<td>Standard Error</td>
<td>122</td>
<td>105</td>
</tr>
<tr>
<td>Part-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>2,095</td>
<td>2,561</td>
</tr>
<tr>
<td>Standard Error</td>
<td>313</td>
<td>162</td>
</tr>
</tbody>
</table>

\(^1\) These items were: Personal spending on clothes, newspapers and books, and toiletries; household spending on household goods and servicing or repairs to household equipment; and child-care related travel.
While the majority of students did complete their diaries during the summer term, and average recorded spending was higher in the summer term, this does not appear to have had a substantial effect on average total expenditure. Furthermore, as expenditure recorded during the diary week is multiplied by 39 weeks in order to report spending for the whole academic year, it is useful to have a spending diary data from two of the three academic terms to account for seasonal variation in expenditure.

### 1.3.8 Interview length and mode

The majority of respondents (68 per cent) completed the questionnaire in a single session. The average length of time taken to fill in the questionnaire by those who completed it in a single session was 30 minutes and 58 seconds. Most completed the questionnaire by themselves online and these respondents took less time on average to complete the survey (28 minutes and 54 seconds) than those completing it with the assistance of a telephone interviewer (35 minutes and 58 seconds) (Table 1.7).

**Table 0.7: Mode of questionnaire completion and average completion time**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Frequency</th>
<th>Per cent</th>
<th>Mean time taken to complete questionnaire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>994</td>
<td>29</td>
<td>35m 55s</td>
</tr>
<tr>
<td>Web</td>
<td>2385</td>
<td>71</td>
<td>28m 54s</td>
</tr>
<tr>
<td>Total</td>
<td>3379</td>
<td>100</td>
<td>30m 58s</td>
</tr>
</tbody>
</table>

*Base: All respondents completing questionnaire in single session.*

### Multiple sessions and mode switches

Nearly a quarter of respondents completed the questionnaire in two sessions, six per cent took three sessions to complete the questionnaire and two per cent of respondents completed the questionnaire in four or more sessions. Of the respondents who completed
the questionnaire in multiple sessions, over half (57 per cent) returned to the questionnaire and completed it on the same day they had started it and the majority (84 per cent) continued with and completed the questionnaire in the same mode that they had begun with (Table 1.8).

Of the respondents who did switch modes, 72 per cent began filling in the questionnaire online and completed it on the telephone while a further 10 per cent began and completed their questionnaire online after being prompted by a call from a telephone interviewer. Seventeen per cent started the interview with the assistance of a telephone interviewer but completed the questionnaire by themselves online, while one per cent started the interview on the telephone, switched to the web questionnaire and finally completed the interview on the telephone (Table 1.8).

### Table 0.8: Number of sessions and modes of completion

<table>
<thead>
<tr>
<th>Number of sessions</th>
<th>Frequency</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>3396</td>
<td>68</td>
</tr>
<tr>
<td>2</td>
<td>1193</td>
<td>24</td>
</tr>
<tr>
<td>3</td>
<td>298</td>
<td>6</td>
</tr>
<tr>
<td>4 or more</td>
<td>105</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>4992</td>
<td>100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Whether switched modes</th>
<th>Frequency</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same mode</td>
<td>1334</td>
<td>84</td>
</tr>
<tr>
<td>Switched modes</td>
<td>262</td>
<td>16</td>
</tr>
<tr>
<td>Total</td>
<td>1596</td>
<td>100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Modes used</th>
<th>Frequency</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web first, complete on telephone</td>
<td>188</td>
<td>72</td>
</tr>
<tr>
<td>Web first, then telephone, completed on web</td>
<td>27</td>
<td>10</td>
</tr>
<tr>
<td>Telephone first, complete on web</td>
<td>44</td>
<td>17</td>
</tr>
<tr>
<td>Telephone first, then web, completed on telephone</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>262</td>
<td>100</td>
</tr>
</tbody>
</table>

Base 1: All respondents with interview mode recorded; Base 2: Respondents with multiple sessions; Base 3: Respondents who switched modes.
1.3.9 Fieldwork and quality control procedures

As with all surveys carried out at NatCen, a programme of back-checking on the work of our telephone interviewers was carried out. (It should be noted that this was only possible for those questionnaires completed over the phone.) A subset (around ten per cent) of respondents who completed the survey over the phone were called back to check that the interviews were conducted correctly.

1.4 Data checking, coding and editing

1.4.1 Data checking

Checks in the questionnaire programme helped to limit the number of data discrepancies. Sometimes, ‘soft checks’ (which could be suppressed by the respondent or telephone interviewer) were used where unusually high values or inconsistent answers were reported, so that these could be checked before the answer was confirmed. (For example, on some questions where inconsistent answers were given, respondents were asked: “Can you just check what you’ve recorded?”) In other cases, ‘hard checks’ (which could not be suppressed by the respondent or interviewer) were used. Also within the programme, each numeric answer was given a set range of possible answers. This allowed only potentially valid answers. For example, if the maximum amount of maintenance grant received by a full-time student is £2906, this would be the upper limit of the range within a question asking about this.

Given that spending may legitimately be very high or very low in a given week, it was not feasible to set validation checks on individual entries in the spending diary.

Interim data were also inspected by researchers from NatCen.

1.4.2 Investigation of status classification for full-time students

Background

In the 07/08 survey, there was an issue with the coding of student status (whether student was Dependent/Independent for the purposes of student finance availability): it appeared that some full-time students were classified as 'Independent' when in fact it looked likely that these students should have been classed as 'Dependent'. The issue was noticed as the figure represented a significant increase in the number of 'independent' full-time students from the previous survey in 04/05, while there had been no such increase in the SLC data1.

1 Although, the SLC data only includes students who have applied for funding, and therefore not entirely the same population covered by SIES, the fact that there had not been a significant increase is independent students suggested that there may have been a coding issue.
Our investigation revealed that the increase in the proportion of 'Independent' full-time students between the two surveys was at least in part due to a change in the way that these students were classified. In the 04/05 survey students were classified as Independent/Dependent depending on self reports of whose income had been taken into account for fees, whereas in the 07/08 survey students were categorised based on the following classification:

Students were classified as 'independent' if they met any of the following criteria:

a) They are part-time students (at FTPT)

OR

b) They are full-time students aged 25+ (calculated from DOB)

OR

c) They are full-time students who are married/divorced/widowed (self report MARITAL)

OR

d) They are full-time students who are financially independent for 3 years prior to course (self report SUPFIN)

OR


e) They have children of their own living with them who are aged 16 or under, or in full-time education and aged 17 or 18 (self report CHILDHH)

Students were classified as 'dependent' if they met all of the following criteria:

They are full-time students, AND are:

a) Aged under 25 (DOB)

AND b) Single/living with partner (MARITAL)

AND c) Not financially independent for 3 years prior to course (SUPFIN)

AND d) Do not have children of their own living with them who are aged 16 or under, or in full-time education and aged 17 or 18 (CHILDHH)

Upon further investigation of the 2007/08 data it transpired that a number of full-time students, who were classified as 'Independent' solely because they claimed to have been financially independent for three years prior to their course, also reported that their parents income had been taken into account when their fees were assessed. In the end it was decided that these students should be recoded as 'Dependent'.

In the 2011/12 survey the question wording for SUPFIN was changed in order to correct for the previous situation where a large number of full-time students said that they had been self-supporting for three years prior to the start of their course. The question was changed to the following: 'Thinking about the three years (or more) prior to the start of the
In the current funding regime student status is taken into account in working out eligibility for maintenance loans and grants, but only in cases where students have applied for certain levels of funding. Under this system student status does not come into consideration in relation to fees as all students pay the same fee. For this reason and in order to keep questionnaire length down to a minimum, in the 2011/12 survey students were not asked whose income was taken into account for fees or in relation to grants/loans. As a result it is not possible to ascertain whether or not the full-time students in question are truly 'Independent' or not. However, it is worth noting a couple of points:

1) Whereas in the 07/08 survey much of the routing for income questions was driven by student status, in the 11/12 survey this was not the case. Therefore, we can be confident that any potential misclassification of full-time students status will not have impacted on income measures;

2) Assuming there has not been a significant shift towards a greater number of independent students in the student population, it would appear that the changes to the question wording for SUPFIN has improved the situation to some degree as fewer students were classified solely on answers to this question than were initially in 07/08.

3) The only impact any potential mis-categorisation would have had on the current survey would be that affected students would have been asked about their own employment situation before the start of their course rather than that of their
parents. This would affect 392 English and 140 Welsh full-time students (some of which may genuinely be 'independent' and some of which may not, i.e. those classed as independent based on response to SUPFIN alone).

1.4.3 Coding and editing of data

A data processing team carried out the coding and editing of questionnaires. Coding data was necessary to enable the analysis of information collected by verbatim answers.

Factsheets were used to code and edit the data. These provided a summary of a productive interview and alerted editors to possible errors or inconsistencies that needed to be dealt with.

Code frames used in editing were developed by the researchers based in part on those used for the 2007/08 study. Where no previous list existed, researchers inspected question responses from the first completed interviews. Any complex editing decision was referred to the researchers for adjudication. These cases were documented and instructions relayed to the data processing team.

A copy of the coding and editing instructions can be found in Appendix 3.

Diary of spending

A data processing team also carried out the coding and editing of the seven-day diaries of spending.

One major purpose of the diary editing was to allocate a code to any spending that students had entered as ‘other’ spending. Similar rules that were developed for the 2007/08 study were adopted here. For each day filled in on the diary there were four ‘other’ items which may have required need editing. The aim of these ‘other’ codes was to allow students to write in spending that did not fit into the existing categories in the diary. The aim of editing the diary was to code these ‘other’ categories into: a) existing diary categories; b) a new ‘other’ category not asked about in the questionnaire; or c) a new other category already asked about in the questionnaire. (Option C was particularly important, as we did not want to double-count items included in the diary that had already been covered in the interview.)

1.4.4 Summary measures of income, expenditure, debt and savings

Within the main report the majority of monetary figures refer to the total amounts of money spent, received or owed over the whole academic year. However in the questionnaire and diary, these monetary amounts may have been recorded referring to a week, a month, a term or over the whole calendar year in order that students could give as accurate figures as possible. It was therefore necessary to create summary derived variables which totalled the amount of money spent or received over the full academic year, assuming that answers given in the questionnaire or diary represented average weeks.
Details of how specific DVs were derived can be found in Appendix 4.

The derived variables relating to the day-to-day spending recorded in the diary follow the same principles. Again it was assumed that spending within the recorded week was an average week. The weekly amount spent on different types of item was therefore multiplied by 39 to give the spending for the academic year.

1.5 Dataset and analysis

1.5.1 Dataset

Interview and diary data were merged together to form one complete dataset. This dataset also included all the derived variables for the interview and diary instruments. A list of key variables, including break variables, can be found in Appendix 5.

Extreme values

Once the summary measures of income, spending, borrowing and savings were created and tested, they were reviewed by the research team. This allowed them to correct any unfeasible answers and also trim any outliers that would skew the analyses if left untreated. Trimming involved identifying outliers through boxplots and then trimming these outliers to the highest amount within the accepted range.

Details about the variables that have been trimmed can be found in Appendix 6.

1.5.2 Adjustments for joint income and expenditure

In the questionnaire and diary students were asked to give answers about their individual income and expenditure whenever this was feasible. However, for some items it was not feasible to record an individual amount when a student lived with a partner (for example, mortgage payments, social security benefits, and household spending on food and entertainment). Therefore, joint amounts were collected and these were adjusted in analysis.

The adjustment was made where students were married or had joint financial responsibility with a partner (defined as sharing responsibility for housing and other essential expenditure). The method of adjustment was to divide the stated expenditure by half, where the respondent was either married or shared joint financial responsibility with their partner. A similar adjustment had been carried out in previous years of SIES.¹

¹ In the previous wave of SIES, a question about whether the respondent had a joint bank account with their partner was also used to inform whether this adjustment was made. A similar question was not asked in the 2011/12 survey, so was not used.
1.5.3 Missing values and imputation

Missing values occur when a respondent provides no answer, or when they opt ‘refuse to answer’ or ‘don’t know’. A different approach to dealing with missing values has been used for the income section than used for the expenditure and savings and debt sections. The SIES questionnaire includes a number of question ‘sets’ which build to provide a figure for each element of student income. For example, in most cases students were asked whether or not they received a particular source of income (such as student maintenance loan), how frequently they received this income, and the regular amount received. The answers to these questions were then used to calculate the total amount received for that particular source of income (this is a derived variable).

Missing values could occur in any one of the questions that make up the set, and would lead to a missing value for the derived variable and any other derived variables higher up the scale. Prior to treatment of missing values, the cumulative size of the missing data (>20%) across the dataset was relatively large, potentially introducing bias and reducing the power of the statistical analysis.

Left untreated this would also have meant that a large amount of useful data would have been lost, as in many cases respondents might have only answered ‘don't know’ or ‘refuse to answer’ to one question lower down in the hierarchy. It was decided therefore to give missing values/data an imputed value in order to retain ALL the cases for analysis, and to make full use of the data that students did provide. Imputed values were either a zero value or a median recipient value (based on the median value of a similar group of recipients). It should be noted that for any one derived variable the number of imputed values was relatively small. However, over 22 derived variables, each made up of several items, the cumulative impact of missing values was significant enough to warrant such an approach as noted above.

Zero values were used when there was little additional data to be able to assume a non-zero value (either from the respondents' other answers to the questions in that ‘set’ or from the answers to that specific question/variable from other similar respondents). Non-zero values were used when there was sufficient additional data to be able to estimate a likely response value.

For example, in the section on student loan for maintenance full-time students were asked: a) whether or not they received a loan; b) how much they received; c) whether their answer was per term or per year; d) whether they got additional weeks; e) how many additional weeks; and f) how much per week. A missing value could occur at any one of these six questions making it impossible to calculate the total received for student loan for maintenance. Therefore, to make use of the data the respondent provided in response to the other questions in the set it is necessary to impute a value for the missing item. If they answered ‘don't know’ or ‘refuse to answer’ for ‘a)’ or ‘d)’ above a value of zero was imputed for the respective part of the total for their maintenance loan (as it was assumed that if they received a maintenance loan they would know about it and be able to answer the question). On the other hand if they answered ‘don't know' or 'refuse to answer’ for 'b)', 'e)' or 'f)' in the example above a value for the missing item was imputed based on the median value for the same group of students (eg full-time English students in receipt of a loan who gave a termly/annual answer). In the case of a missing value for 'c)' in the

A summary of the partner adjusted derivations can be found in Appendix 4.
example above it was normally possible to work out whether the respondent had given a
termly or annual amount based on their answer to 'b)' and so this would be corrected
accordingly. ¹

As noted, this approach is driven by the relatively large size of the cumulative missing data
(>20%) across the dataset, and the single source of data available for income (survey
responses only). This approach follows that of the previous wave of SIES. It ensures that a
consistent base is used throughout the analysis of income, and has the added benefit that
the mean values of each element of student income sum to the mean value of the total
student income and that it is possible to estimate the proportion of income among students
coming from each source.

For the SIES analysis dealing with expenditure, missing values were treated as missing for
the analysis (i.e. excluded from each relevant statistical calculation), and different bases
were used depending on the most appropriate sample to use (e.g. diary responses or
survey responses). This approach was driven by the relatively small size of the cumulative
missing data (<10% across the entire section) and the different data sources available
diary and main-stage questionnaire).

Similarly, with the analysis relating to savings and debt, missing values were also treated
as missing for the analysis, and therefore different bases were used for each derived
variable. Where there were overlaps between income variables and debt variables, the
cleaned and imputed variables from the income section were used to ensure consistency.
The overall approach was driven by the relatively small size of cumulative missing data in
this section (<10% across the entire section), the difficulty in making a 'best guess' for
missing data, and the case that there were relatively few contributory variables for each
derived variable (i.e. few questions in each 'set').

1.5.4 Comparing diary and questionnaire data

Day-to-day spending in SIES is captured in a seven-day spending diary. The diary is
intended to be completed by respondents at the end of each day, over seven days, and
records information on smaller items such as food, household goods and entertainment.

As well as capturing this type of information in the spending diary, the SIES 2011/12 main
questionnaire also included a series of questions on ‘everyday' spending. These questions
asked about expenditure on items such as food and entertainment over the 'average
week'.

¹ In the case of income from paid work a slightly different approach was used for treatment of missing
values. In the relatively few cases where students answered 'don't know' or 'refuse to answer' how much
they earned it was assumed that the income from the job was not significant (otherwise they would be able
to say roughly how much they were paid) and so they were assigned an income of zero for this part of their
work income. In most of these cases respondents answered how much they were paid during term-time and
not how much they earned during vacations or vice-versa, in which case any pay reported was assigned to
the appropriate job. In a few cases students told us how much they earned from a given job but answered
'don't know' or 'refuse to answer' when the job started. In these latter cases a median start date for similar
students (eg part-time Welsh students with job 1) was imputed in order to make use of the answers given.
Again this only applied to a relatively small number of respondents (ie less than twelve for any of job 1 to 7).
Table 1.10 below compares the mean amounts that respondents recorded spending in both the diary and the main questionnaire. Amounts are very similar in some areas (for example, spending on cigarettes and alcohol and newspapers and stationery). By contrast, in other areas, the amount reported in the main questionnaire is higher than in the spending diary (e.g. in the case of CDs and downloaded music), while in other areas the diary amount is higher (e.g. meals and snacks eaten outside the home).

Based on this evidence, it is recommended that the diary should be retained in any future waves of the Student Income and Expenditure Survey. The diary (which asks about money spent today) is likely to provide a more accurate measure of day-to-day spending compared with questions in the main questionnaire (which ask about money spent on certain items in an average week). Without the diary, students may be likely to under-estimate some areas of spending (such as money spent on meals and snacks), while other categories of spending may be overestimated (such as money spent on CDs and downloaded music).

Table 0.10: Comparison of questionnaire and diary spending variables

<table>
<thead>
<tr>
<th></th>
<th>Questionnaire (Mean)</th>
<th>Diary (Mean)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDs, downloaded music and DVDs (bought and rented)</td>
<td>2.2</td>
<td>0.2</td>
</tr>
<tr>
<td>Newspapers and stationery</td>
<td>2.9</td>
<td>3.0</td>
</tr>
<tr>
<td>Toiletries and medicine</td>
<td>6.5</td>
<td>7.1</td>
</tr>
<tr>
<td>Cigarettes, tobacco and alcohol consumed outside the home - (e.g. alcohol consumed in a bar, pub or someone else's home)</td>
<td>13.7</td>
<td>13.2</td>
</tr>
<tr>
<td>Meals and snacks from cafes, pubs, restaurants, shops, work, takeaway, college or student union premises</td>
<td>16.4</td>
<td>25.8</td>
</tr>
<tr>
<td>Entertainment, including trips to the cinema or theatre, entry to nightclubs, attending sporting events, participating in clubs and societies and religious activities</td>
<td>16.8</td>
<td>14.6</td>
</tr>
<tr>
<td>Food and drink bought to consume at home</td>
<td>37.5</td>
<td>35.9</td>
</tr>
<tr>
<td>Household goods (such as cleaning materials and pet food) and laundry or dry cleaning</td>
<td>6.8</td>
<td>14.5</td>
</tr>
</tbody>
</table>
1.6 Weighting

1.6.1 Summary of approach
The SIES weights were calculated from the estimated probability of being both selected and responding to the survey. For the survey, this overall probability was calculated as the product of two main components:

- the probability that the institution/student was selected
- the probability of taking part in the main interview.

The weights were calculated as the inverse of the overall probability. Extreme weights were trimmed at each stage so as to reduce their impact. Finally, the weights were adjusted so that the characteristics of the weighted sample matched that of the student population (as recorded by HESA) in terms of age and sex.

As with the 2007/08 survey the overall aim was to generate a weighted sample that matched the population of students as closely as possible, whilst at the same time generating weights that were not so variable that the standard errors of survey estimates were unnecessarily inflated.

1.6.2 Selection weights

Computing the probability that the institution/student was selected
Details of how institutions and students within institutions were selected, and the resulting selection probabilities, are provided below.

Probability of selection for institutions
The target numbers of institutions were 53 English HEIs, 20 English FECs, 10 Welsh HEIs, 5 Welsh FECs, and the OU. Within institutions separate samples were selected across a number of student groups: medics; English-domiciled full-time; Welsh-domiciled full-time and part-time.
**English HEIs**

Of the 130 HEIs in England, 65 were selected for the survey with the expectation that 53 would agree to take part. These 65 institutions were selected using stratification and with probability proportional to their weighted size. The weighted size per institution was calculated as a weighted sum of three figures:

0.78 * (number of students in the instruction who were full-time English domiciled)

+ 8.8 * (number of students in the instruction who were full-time Welsh domiciled)

+ 1.29 * (number of 25%+ part-time students).

The weight per group (0.78, 8.8, 1.29) was calculated as the ratio of the percentage of students in the group targeted for the survey to the percentage of students in the group for the whole set of 130 institutions. The table below gives the figures based on 2010-2011 HESA data.

**Table 0.11: Weighting, English HEIs**

<table>
<thead>
<tr>
<th></th>
<th>FT English-domiciled</th>
<th>FT Welsh-domiciled</th>
<th>Part-time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target for survey</td>
<td>59.4</td>
<td>11.5</td>
<td>29.1</td>
</tr>
<tr>
<td>% in all HEIs</td>
<td>76.0</td>
<td>1.3</td>
<td>22.6</td>
</tr>
</tbody>
</table>

Essentially, by applying the weights, this ‘converts’ the actual number of students in each of the 130 institutions into an adjusted number for which, when added across all 130 HEIs, the three groups are in proportion to each other exactly in line with the target proportions.

The largest 15 institutions (according to their weighted size) were all selected for the survey – the 15 being those institutions with a weighted size larger than the sampling interval. A further 50 HEIs were selected with probability proportional to their weighted size (the sampling interval was re-calculated after removing the largest 15).

**Welsh HEIs**

All ten Welsh HEIs were selected for the survey.

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1 The reason for doing this is that it creates a ‘synthetic’ population per institution that exactly reflects the survey sample we are trying to select. Selection with probability proportional to this synthetic population size allows for an exactly equal number of students to be selected per institution which, at the same time, gives samples per group with equal probabilities of selection. Within each selected institution the students will be selected in proportion to their weighted group size.
**English FECs**

There were 154 English FECs with eligible students. Of these, those with less than 100 eligible students were excluded, leaving 103 FECs. This is in line with previous SIESs: it means that 33% of FECs are excluded, but just 3.2% of students. From the 103 FECs remaining, 40 were selected for the survey, with the expectation that 20 would agree to take part.

The selection followed a very similar procedure to that for English HEIs. The 40 were selected using stratification and with probability proportional to weighted size. The weighted size per FEC was calculated as:

\[ 1.16 \times (\text{full-time student}) + 0.78 \times (\text{part-time student}) \]

The table below shows how the weights were derived (using 2010-2011 ILR data).

**Table 0.12: Weighting, English FECs**

<table>
<thead>
<tr>
<th></th>
<th>Full-time (%)</th>
<th>Part-time (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target for survey</td>
<td>67.0</td>
<td>33.0</td>
</tr>
<tr>
<td>% in all HEIs</td>
<td>57.7</td>
<td>42.3</td>
</tr>
<tr>
<td>Weight</td>
<td>67/57.7=1.16</td>
<td>33/42.3=0.78</td>
</tr>
</tbody>
</table>

The largest nine institutions (according to their weighted size) were all selected for the survey – the nine being those FECs with a weighted size larger than the sampling interval. A further 31 HEIs were selected with probability proportional to the weighted size (the sampling interval was re-calculated after removing the largest 9).

**Welsh FECs**

All eligible Welsh FECs were selected for the survey and all eligible students within these institutions were selected due to the low number of students in these institutions. One third of all students were assigned to the main and two thirds to the reserve. Therefore for this group selection probabilities are the same for all students (1/3).

**Dealing with non-response by institutions**

In the 2007/08 survey a policy was adopted of replacing any institutions that refused with other ‘similar’ institutions. This meant that the final sample of institutions was not a strict probability sample. We did not adopt this method in the 2011/12 survey – instead we selected a larger pool of institutions to allow for refusals. 120 institutions were selected from which a total of 22 did not take part (a response rate of 82%).

In 2007/08 due to the replacement of refusals by other institutions, the response rate was a lot higher (after replacement only 4 institutions did not take part) and therefore no
adjustment was made to account for this loss. The point was also made that, in part, the final adjustment stage of the weights is an attempt to deal with any bias this non-response introduces. In the 2011/12 survey, this final adjustment stage should deal sufficiently with any bias introduced at this stage (since all analyses will be conducted at the student level and institution information will be incorporated into the student weights) and therefore there was no need for a further step in the weighting.

Probability of selection for students within institutions

Another difference to the previous survey is that this time we were able to sample second year plus students ourselves, as the HESA data became available in time for us to do this. However, the sampling of institutions was done before this data became available, and so selection probabilities for institutions are based on the 2009-10 data. Using the latest HESA data (2011-12) we updated the sampling proportions of the groups of students selected from each institution. Therefore the sample of students was no longer an equal probability sample. However, we expect differences between the years on the weighted sizes of institutions to be minimal and therefore to approximately replicate an equal probability sample. We calculated these selection probabilities and they were included in the final weights.

For the 2007/08 survey information was obtained from the institutions directly on the size of the population groups from which the samples were selected. This time we selected the sample ourselves from HESA records for the second year plus students and so we already have this information to hand for second year plus students. For the first year students the same approach as in 2007/08 was taken. That is, we asked each institution selected who took part in the survey for information on both the number of students per group that were selected and the size of the population groups from which the samples were selected. Not all institutions have sent us this information however. For those that did not we assumed that the actual number of students within an institution equals their HESA count (as was done in 2007/08).

In previous years of SIES equal numbers of students have been taken from the 10 Welsh HEIs. This is inefficient because the HEIs are all selected with the same probability rather than with probability proportional to size – so this part of the sample ended up with hugely variable weights. Therefore this time the students in Welsh HEIs have been selected proportionate to their numbers.

As in 2007/08, for some institutions there was a marked difference between the HESA count and the population that institutions had told us they had drawn their sample from. We have again taken the numbers provided by the institutions as correct. But the result is that the selection probabilities, and hence the survey weights, will vary more than we might have hoped for across institutions. Below we explain how we have dealt with this.

Trimming the extreme selection weights
As noted above, the selection weights calculated for the survey (within categories defined by sector and mode of study) were very variable. Given that variance in weights tends to inflate standard errors of estimates, it is standard practice to trim the weights at the extreme tails of the distribution to reduce the variance, even at the risk of introducing a small bias.

The trimming was carried out as follows:

Individuals were listed in order of their selection weights for each of the following nine subgroups:

1. English Higher Education Institutions (HEI), medics
2. English HEIs, full-time, English-domiciled
3. English HEIs, full-time, Welsh-domiciled
4. English HEIs, part-time, English- & Welsh-domiciled
5. Welsh HEIs, full-time, English-domiciled
6. Welsh HEIs, full-time, Welsh-domiciled
7. Welsh HEIs, part-time, English- & Welsh-domiciled
8. FECs, full-time
9. FECs, part-time

For groups 1, 2, 3, 4, 7, 8 and 9, the selection weights were trimmed 1% at each tail. For the remaining groups (Welsh HEIs), no trimming was carried out as there were no extremely large or extremely small values.

However this approach does not entirely eliminate the problem of extreme weights. As was also the case in the 2007/08 survey, we were again able to compare self-reported full-time/part-time status from the survey with that reported by the institution (either from the HESA data for second year plus students or from the data sent to us from the institution for first year students). We found that a small number of students gave a self-report different to that of the institution. As a result, students with a mismatch had selection weights very different to other students who self-reported as they did.

To deal with this the following strategy was adopted: any student with a self-report different to their sample group was given the selection weight equal to the median weight of their self-reporting equivalents. The number of students affected (151 in total) is shown in the following table.

**Table 0.13: Trimming extreme selection weights**

<table>
<thead>
<tr>
<th>Final sample group</th>
<th>FT English-domiciled</th>
<th>FT Welsh-domiciled</th>
<th>Part-time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FT English-domiciled</td>
<td>-</td>
<td>0</td>
<td>25</td>
</tr>
<tr>
<td>FT Welsh-domiciled</td>
<td>0</td>
<td>-</td>
<td>16</td>
</tr>
<tr>
<td>PT</td>
<td>98</td>
<td>23</td>
<td>-</td>
</tr>
</tbody>
</table>
To investigate the possible bias that may have been introduced because of the trimming, a number of measures was compared before and after each stage of trimming and with the population estimates\(^1\). As can be seen from the following table, the benefits in terms of decreased variance in the weights should compensate for any small bias that may have been introduced by trimming of the selection weights.

### Table 0.14: Trimming extreme selection weights

<table>
<thead>
<tr>
<th></th>
<th>Before trimming</th>
<th>After initial trimming</th>
<th>After final trimming</th>
<th>Population estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>42.9%</td>
<td>43.0%</td>
<td>43.1%</td>
<td>42.3%</td>
</tr>
<tr>
<td>Part-time</td>
<td>15.0%</td>
<td>15.1%</td>
<td>15.9%</td>
<td>26.1%</td>
</tr>
<tr>
<td>Welsh domiciled in FT HEIs or OU</td>
<td>9.6%</td>
<td>9.6%</td>
<td>9.6%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Welsh domiciled</td>
<td>5.6%</td>
<td>5.6%</td>
<td>5.6%</td>
<td>-</td>
</tr>
<tr>
<td>Home address (HA) in London</td>
<td>19.4%</td>
<td>18.4%</td>
<td>18.4%</td>
<td>18.4%</td>
</tr>
<tr>
<td>HA in Wales</td>
<td>5.9%</td>
<td>5.9%</td>
<td>5.9%</td>
<td>-</td>
</tr>
<tr>
<td>HA in East of England</td>
<td>9.1%</td>
<td>9.1%</td>
<td>9.1%</td>
<td>-</td>
</tr>
<tr>
<td>HA in urban area (&gt;=10k)</td>
<td>80.0%</td>
<td>79.9%</td>
<td>79.9%</td>
<td>-</td>
</tr>
<tr>
<td>HA in town and fringe</td>
<td>7.8%</td>
<td>7.8%</td>
<td>7.8%</td>
<td>-</td>
</tr>
<tr>
<td>HA in village</td>
<td>7.1%</td>
<td>7.1%</td>
<td>7.1%</td>
<td>-</td>
</tr>
<tr>
<td>HA in “least deprived” IMD (England)</td>
<td>22.3%</td>
<td>22.3%</td>
<td>22.4%</td>
<td>-</td>
</tr>
<tr>
<td>HA in “most deprived” IMD (England)</td>
<td>18.0%</td>
<td>17.9%</td>
<td>18.0%</td>
<td>-</td>
</tr>
<tr>
<td>HA in “least deprived” IMD (Wales)</td>
<td>28.2%</td>
<td>28.0%</td>
<td>28.0%</td>
<td>-</td>
</tr>
<tr>
<td>HA in “most deprived” IMD (Wales)</td>
<td>13.7%</td>
<td>13.6%</td>
<td>13.6%</td>
<td>-</td>
</tr>
</tbody>
</table>

### 1.6.3 Non-response weighting

Having calculated and trimmed the selection weights the next stages for the weighting were adjustments for non-response.

The data collection methodology differed from the 2007/08 survey. In 2007/08 an initial opt-in questionnaire was sent to students. Those who returned the opt-in questionnaire were then followed-up by an interviewer for a CAPI interview. The weighting reflected the fact that there were two stages where students could refuse to take part in the survey. The non-response weights were comprised of three stages:

- adjustment for refusal to be followed-up by an interviewer (conditional on returning a postal opt-in questionnaire and being eligible for follow-up)
- adjustment for non-response to the survey (conditional on agreeing to follow-up)
- a final adjustment of the survey to the HESA age-sex distribution.

\(^1\) Population estimates were available for the first three measures reported in the table.
In 2011-12 there was no opt-in questionnaire. Students were asked for consent for their details to be passed onto survey contractors to carry out the National Study Survey and surveys of student finances when they enrolled for their course. Students who were selected for the survey who did not give this consent were removed from the selection. Unfortunately we have no information available on those first year students who did not give consent for their contact details to be passed on. Biases introduced at this consent stage will therefore not be adjusted for. However, it is hoped that this bias will be reduced by making a final adjustment to the HESA age-sex distribution.

Therefore in 2011/12, the non-response weighting comprised of the following two stages:

- adjustment for non-response to the survey (conditional on giving consent for us to gain their contact details)
- further adjustment of the survey respondents to match the HESA age-sex distribution.

**Modelling the probability of taking part in the main interview**

The probability of agreeing to take part in the main interview was estimated using a non-response model. The approach adopted was to use a logistic regression model to predict a binary variable defined as:

1 = completed questionnaire

0 = gave consent for their contact details to be given but a completed questionnaire was not obtained

The predictors of this variable entered into the model were¹:

- Gender
- Year of study
- Government Office Region
- Sector (English/Welsh HEIs/FECs) BY full-time/part-time status BY English/Welsh domiciled
- Medics in English/Welsh HEIs (Yes/No)

¹ In 2011/12, we did not have all of the information that was available for the 2007/08 survey. Government Office Region was based on student’s home address and matched from the 2011 Census of the Population, Other variables from the Census such as “Urban/Rural Indicator” and “IMD score (quintiles)” were checked but because of the high proportion of non-matches, only one Census variable could be used (because of high correlation).
Variables were entered forward stepwise into the model so as to avoid generating an overly complex model that would lead to more variability in the non-response weights. Three variables were found to be significant: year of study, Government Office Region, and sector by status by domicile. The model coefficients are given in the table below. The non-response weight was defined as the inverse of the model-predicted probability.

Table 0.15: Non-response weighting

<table>
<thead>
<tr>
<th></th>
<th>Coefficient (log odds)</th>
<th>Odds</th>
<th>p</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year of study</strong></td>
<td></td>
<td></td>
<td>&lt;0.001</td>
</tr>
<tr>
<td>Year 1</td>
<td>0</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Year 2</td>
<td>-0.46</td>
<td>0.63</td>
<td>&lt;0.001</td>
</tr>
<tr>
<td>Open University</td>
<td>-1.05</td>
<td>0.35</td>
<td>&lt;0.001</td>
</tr>
<tr>
<td><strong>Government Office Region</strong></td>
<td></td>
<td></td>
<td>&lt;0.001</td>
</tr>
<tr>
<td>North East</td>
<td>0</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>North West</td>
<td>-0.22</td>
<td>0.80</td>
<td>0.034</td>
</tr>
<tr>
<td>Yorkshire and The Humber</td>
<td>-0.11</td>
<td>0.90</td>
<td>0.317</td>
</tr>
<tr>
<td>East Midlands</td>
<td>0.02</td>
<td>1.02</td>
<td>0.834</td>
</tr>
<tr>
<td>West Midlands</td>
<td>-0.22</td>
<td>0.80</td>
<td>0.045</td>
</tr>
<tr>
<td>East of England</td>
<td>-0.02</td>
<td>0.98</td>
<td>0.831</td>
</tr>
<tr>
<td>London</td>
<td>-0.38</td>
<td>0.68</td>
<td>&lt;0.001</td>
</tr>
<tr>
<td>South East</td>
<td>-0.04</td>
<td>0.96</td>
<td>0.718</td>
</tr>
<tr>
<td>South West</td>
<td>-0.04</td>
<td>0.96</td>
<td>0.709</td>
</tr>
<tr>
<td>Wales</td>
<td>-0.40</td>
<td>0.67</td>
<td>0.012</td>
</tr>
<tr>
<td>Scotland or address not matched</td>
<td>-0.66</td>
<td>0.52</td>
<td>&lt;0.001</td>
</tr>
<tr>
<td><strong>Sector BY status BY domicile</strong></td>
<td></td>
<td></td>
<td>&lt;0.001</td>
</tr>
<tr>
<td>English HEIs, full-time, English-domiciled</td>
<td>0</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>English HEIs, full-time, Welsh-domiciled</td>
<td>0.17</td>
<td>1.19</td>
<td>0.372</td>
</tr>
<tr>
<td>English HEIs, part-time, English- &amp; Welsh-domiciled</td>
<td>-0.33</td>
<td>0.72</td>
<td>&lt;0.001</td>
</tr>
<tr>
<td>Welsh HEIs, full-time, English-domiciled</td>
<td>0.35</td>
<td>1.42</td>
<td>0.005</td>
</tr>
<tr>
<td>Welsh HEIs, full-time, Welsh-domiciled</td>
<td>0.12</td>
<td>1.13</td>
<td>0.409</td>
</tr>
<tr>
<td>Welsh HEIs, part-time</td>
<td>-0.25</td>
<td>0.78</td>
<td>0.287</td>
</tr>
<tr>
<td>FECs, full-time</td>
<td>-0.17</td>
<td>0.84</td>
<td>0.215</td>
</tr>
<tr>
<td>FECs, part-time</td>
<td>-0.31</td>
<td>0.73</td>
<td>0.080</td>
</tr>
<tr>
<td><strong>Intercept</strong></td>
<td>0.06</td>
<td>1.06</td>
<td>0.568</td>
</tr>
</tbody>
</table>

Post-stratification to HESA totals

To reduce any residual bias, we included a final adjustment to the weights to bring the survey into line with HESA. This final stage adjusted the existing weights (the previous
components of weighting described above multiplied together) to HESA counts by age and sex within each of the following nine groups:

1. English HEIs, full-time, English-domiciled
2. English HEIs, full-time, Welsh-domiciled
3. English HEIs, part-time, English- & Welsh-domiciled
4. Welsh HEIs, full-time, English-domiciled
5. Welsh HEIs, full-time, Welsh-domiciled
6. Welsh HEIs, part-time, English- & Welsh-domiciled
7. FECs, full-time
8. FECs, part-time
9. Open University

The population figures used for the calibration adjustment are shown in following table.

**Table 0.16: Post-stratification**

<table>
<thead>
<tr>
<th>HESA 2010/11 population estimate</th>
<th>Age</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>&lt;=25</td>
<td>&gt;26</td>
</tr>
<tr>
<td>English HEIs, full-time, English domiciled</td>
<td>578582</td>
<td>80837</td>
</tr>
<tr>
<td>English HEIs, full-time, Welsh domiciled</td>
<td>11490</td>
<td>545</td>
</tr>
<tr>
<td>English HEIs, part-time, English- &amp; Welsh-domiciled</td>
<td>60139</td>
<td>191151</td>
</tr>
<tr>
<td>Welsh HEIs, full-time, English domiciled</td>
<td>18774</td>
<td>689</td>
</tr>
<tr>
<td>Welsh HEIs, full-time, Welsh domiciled</td>
<td>20837</td>
<td>4281</td>
</tr>
<tr>
<td>Welsh HEIs, part-time</td>
<td>1915</td>
<td>6368</td>
</tr>
<tr>
<td>FECs, full-time</td>
<td>13414</td>
<td>6235</td>
</tr>
<tr>
<td>FECs, part-time</td>
<td>6091</td>
<td>11474</td>
</tr>
<tr>
<td>Open University</td>
<td>10850</td>
<td>38844</td>
</tr>
</tbody>
</table>

**Distribution of the final weights**

The following table gives the distribution of the final trimmed and calibrated weights.

**Table 0.17: Final weight distribution**

<table>
<thead>
<tr>
<th>English HEIs</th>
<th>Welsh HEIs</th>
<th>FECs</th>
<th>OU</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>English HEIs</td>
<td>Welsh HEIs</td>
<td>FECs</td>
<td>OU</td>
<td>Total</td>
</tr>
</tbody>
</table>

34
### The effect of weights on effective sample size for key groups

The effective sample size of a given weighted sample is the equivalent of the unweighted sample size which would have produced the same statistical precision (e.g. width of the confidence interval). It is calculated as the squared sum of all weights (summed over all cases in the sample) divided by the sum of all squared weights (it is also defined as the ratio of the achieved sample size to the sample design effect). Sample efficiency (the effective sample size as a percentage of the actual) is typically lower for the total sample than for sub-groups because of the weight variability which tends to be greater for the sample as a whole.

The following table present the effective sample sizes for full-time and part-time students for each sector and overall, followed by figures by domicile.

<table>
<thead>
<tr>
<th></th>
<th>English HEIs</th>
<th>Welsh HEIs</th>
<th>FECs</th>
<th>OU</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>1.45</td>
<td>0.19</td>
<td>0.18</td>
<td>-</td>
<td>0.91</td>
</tr>
<tr>
<td>Median</td>
<td>1.58</td>
<td>0.21</td>
<td>0.14</td>
<td>-</td>
<td>0.29</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>1.04</td>
<td>0.10</td>
<td>0.17</td>
<td>-</td>
<td>1.01</td>
</tr>
<tr>
<td>Minimum</td>
<td>0.001</td>
<td>0.01</td>
<td>0.001</td>
<td>-</td>
<td>0.001</td>
</tr>
<tr>
<td>Maximum</td>
<td>5.85</td>
<td>0.43</td>
<td>1.08</td>
<td>-</td>
<td>5.85</td>
</tr>
<tr>
<td>5th percentile</td>
<td>0.04</td>
<td>0.01</td>
<td>0.01</td>
<td>-</td>
<td>0.01</td>
</tr>
<tr>
<td>95% percentile</td>
<td>3.08</td>
<td>0.34</td>
<td>0.53</td>
<td>-</td>
<td>2.80</td>
</tr>
<tr>
<td><strong>Part-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>2.10</td>
<td>0.22</td>
<td>0.36</td>
<td>1.04</td>
<td>1.29</td>
</tr>
<tr>
<td>Median</td>
<td>2.02</td>
<td>0.23</td>
<td>0.29</td>
<td>1.06</td>
<td>0.88</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>1.65</td>
<td>0.12</td>
<td>0.34</td>
<td>0.17</td>
<td>1.41</td>
</tr>
<tr>
<td>Minimum</td>
<td>0.01</td>
<td>0.01</td>
<td>0.01</td>
<td>0.70</td>
<td>0.01</td>
</tr>
<tr>
<td>Maximum</td>
<td>10.36</td>
<td>0.77</td>
<td>2.50</td>
<td>1.39</td>
<td>10.36</td>
</tr>
<tr>
<td>5th percentile</td>
<td>0.09</td>
<td>0.06</td>
<td>0.03</td>
<td>0.76</td>
<td>0.06</td>
</tr>
<tr>
<td>95% percentile</td>
<td>4.75</td>
<td>0.37</td>
<td>0.97</td>
<td>1.33</td>
<td>3.92</td>
</tr>
</tbody>
</table>

**Table 0.18: Effects of weights on effective sample size for key groups**
<table>
<thead>
<tr>
<th></th>
<th>English HEIs</th>
<th>Welsh HEIs</th>
<th>FECs</th>
<th>OU</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>2196</td>
<td>1106</td>
<td>525</td>
<td>-</td>
<td>3827</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>1450</td>
<td>875</td>
<td>276</td>
<td>-</td>
<td>1720</td>
</tr>
<tr>
<td>Effective as % of actual</td>
<td>66%</td>
<td>79%</td>
<td>53%</td>
<td>-</td>
<td>45%</td>
</tr>
<tr>
<td><strong>Part-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>567</td>
<td>175</td>
<td>231</td>
<td>225</td>
<td>1198</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>350</td>
<td>134</td>
<td>122</td>
<td>219</td>
<td>548</td>
</tr>
<tr>
<td>Effective as % of actual</td>
<td>62%</td>
<td>77%</td>
<td>53%</td>
<td>97%</td>
<td>46%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>English-domiciled</th>
<th>Welsh-domiciled</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-time</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>2766</td>
<td>1061</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>1558</td>
<td>714</td>
</tr>
<tr>
<td>Effective as % of actual</td>
<td>56%</td>
<td>67%</td>
</tr>
<tr>
<td><strong>Part-time</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>1008</td>
<td>190</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>514</td>
<td>76</td>
</tr>
<tr>
<td>Effective as % of actual</td>
<td>51%</td>
<td>40%</td>
</tr>
</tbody>
</table>

**1.6.4 Diary weights**

In 2004/05 and 2007/08 separate weights for the diary analysis (which took account of non-completers) were considered but discounted due to the high diary return rate and the fact that no obvious differences were found between the profile of students being interviewed and those completing a diary.

In contrast, in 2011/12 the diary response rate was not high (52%) and significant discrepancies were found in the profiles of respondents to the main questionnaire and those completing a diary (see section 4.2). Therefore, separate non-response weights were computed for the diary analysis. The diary weighting comprised of the following two stages:

- adjustment for non-completing a diary (conditional on responding to the main survey)
- further adjustment of the diary respondents to match the HESA age-sex distribution.

**Modelling the probability of completing a diary**

The probability of completing a diary was estimated using a non-response model. The approach adopted was to use a logistic regression model to predict a binary variable defined as:
1 = completed diary
0 = completed main survey questionnaire but a completed diary was not obtained

The predictors of this variable entered into the model were:

- Gender
- Age group
- Location of institution
- Full-time/part-time status
- Nation of living in the UK
- Living in London (Yes/No)
- Qualification studying for
- Main course subject
- Course length
- Year of study
- Marital status
- Living with adults who are financially dependant on respondent (Yes/No)
- Having children (Yes/No)
- Ethnicity
- Religion
- Illness/disability (Yes/No)
- Sector

Variables were entered forward stepwise into the model so as to avoid generating an overly complex model that would lead to more variability in the non-response weights. Eight variables were found to be significant: age group, main subject, course length, having children, ethnicity, illness/disability, religion, and sector. The model coefficients are given in the table below. The diary non-response weight was defined as the inverse of the model-predicted probability, and was trimmed at the top 0.5% to reduce variance inflation due to few very large weights. There were not any very small weights at the lower end of the distribution, therefore there was no need to trim the weights “symmetrically” as was the case at the previous step.

Table 0.19: Diary non-response weighting

<table>
<thead>
<tr>
<th>Age group</th>
<th>Coefficient (log odds)</th>
<th>Odds</th>
<th>p</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;=18</td>
<td>0</td>
<td>1</td>
<td>0.022</td>
</tr>
<tr>
<td>19</td>
<td>0.21</td>
<td>1.23</td>
<td>0.078</td>
</tr>
<tr>
<td>20</td>
<td>0.21</td>
<td>1.23</td>
<td>0.078</td>
</tr>
<tr>
<td>21</td>
<td>0.11</td>
<td>1.12</td>
<td>0.391</td>
</tr>
<tr>
<td>22-24</td>
<td>-0.03</td>
<td>0.97</td>
<td>0.799</td>
</tr>
<tr>
<td>25+</td>
<td>-0.12</td>
<td>0.89</td>
<td>0.361</td>
</tr>
<tr>
<td>Main subject</td>
<td>Coefficient (log odds)</td>
<td>Odds</td>
<td>p</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>------------------------</td>
<td>--------</td>
<td>-------</td>
</tr>
<tr>
<td>Biological Sciences (including Psychology)</td>
<td>0</td>
<td>1</td>
<td>0.000</td>
</tr>
<tr>
<td>Business and Administrative Studies</td>
<td>-0.47</td>
<td>0.63</td>
<td>0.003</td>
</tr>
<tr>
<td>Computer Sciences</td>
<td>0.05</td>
<td>1.05</td>
<td>0.797</td>
</tr>
<tr>
<td>Creative Arts and Design</td>
<td>-0.13</td>
<td>0.88</td>
<td>0.386</td>
</tr>
<tr>
<td>Education</td>
<td>0.01</td>
<td>1.01</td>
<td>0.964</td>
</tr>
<tr>
<td>Engineering and Technology</td>
<td>0.01</td>
<td>1.01</td>
<td>0.963</td>
</tr>
<tr>
<td>Historical and Philosophical studies</td>
<td>0.26</td>
<td>1.30</td>
<td>0.180</td>
</tr>
<tr>
<td>Mathematical and Physical Sciences (including Chemistry and Physics)</td>
<td>0.12</td>
<td>1.13</td>
<td>0.499</td>
</tr>
<tr>
<td>Languages (including English and Classics)</td>
<td>0.34</td>
<td>1.41</td>
<td>0.054</td>
</tr>
<tr>
<td>Law</td>
<td>-0.24</td>
<td>0.78</td>
<td>0.195</td>
</tr>
<tr>
<td>Social Studies (including Economics, Politics and Geography)</td>
<td>0.25</td>
<td>1.28</td>
<td>0.100</td>
</tr>
<tr>
<td>Medicine and Dentistry and allied subjects</td>
<td>0.03</td>
<td>1.03</td>
<td>0.843</td>
</tr>
<tr>
<td>Unsure/other</td>
<td>-0.41</td>
<td>0.66</td>
<td>0.001</td>
</tr>
<tr>
<td>Course length</td>
<td></td>
<td></td>
<td>0.000</td>
</tr>
<tr>
<td>1 year</td>
<td>0</td>
<td>1</td>
<td>0.000</td>
</tr>
<tr>
<td>2 years</td>
<td>-0.34</td>
<td>0.71</td>
<td>0.051</td>
</tr>
<tr>
<td>3 years</td>
<td>-0.32</td>
<td>0.73</td>
<td>0.052</td>
</tr>
<tr>
<td>4 years</td>
<td>-0.04</td>
<td>0.96</td>
<td>0.818</td>
</tr>
<tr>
<td>5 years</td>
<td>-0.09</td>
<td>0.92</td>
<td>0.665</td>
</tr>
<tr>
<td>6 years or more</td>
<td>0.37</td>
<td>1.44</td>
<td>0.118</td>
</tr>
<tr>
<td>Have children</td>
<td></td>
<td></td>
<td>0.000</td>
</tr>
<tr>
<td>Yes</td>
<td>0</td>
<td>1</td>
<td>0.000</td>
</tr>
<tr>
<td>No</td>
<td>0.53</td>
<td>1.70</td>
<td>0.000</td>
</tr>
<tr>
<td>Ethnicity</td>
<td></td>
<td></td>
<td>0.000</td>
</tr>
<tr>
<td>Other or missing</td>
<td>0</td>
<td>1</td>
<td>0.000</td>
</tr>
<tr>
<td>White</td>
<td>0.34</td>
<td>1.40</td>
<td>0.000</td>
</tr>
<tr>
<td>Illness or disability</td>
<td></td>
<td></td>
<td>0.000</td>
</tr>
<tr>
<td>yes</td>
<td>0</td>
<td>1</td>
<td>0.000</td>
</tr>
<tr>
<td>Coefficient (log odds)</td>
<td>Odds</td>
<td>p</td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>no</td>
<td>-0.35</td>
<td>0.71</td>
<td>0.000</td>
</tr>
<tr>
<td>Religion</td>
<td>0.004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No religion</td>
<td>0</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Christian</td>
<td>-0.19</td>
<td>0.83</td>
<td>0.004</td>
</tr>
<tr>
<td>Other religion or missing</td>
<td>-0.28</td>
<td>0.76</td>
<td>0.009</td>
</tr>
<tr>
<td>Sector</td>
<td>0.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>English HEIs, full-time</td>
<td>0</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>English HEIs, part-time</td>
<td>-0.48</td>
<td>0.62</td>
<td>0.000</td>
</tr>
<tr>
<td>Welsh HEIs</td>
<td>-0.15</td>
<td>0.86</td>
<td>0.275</td>
</tr>
<tr>
<td>FECs</td>
<td>-0.48</td>
<td>0.62</td>
<td>0.005</td>
</tr>
<tr>
<td>Open University</td>
<td>-0.56</td>
<td>0.57</td>
<td>0.001</td>
</tr>
<tr>
<td>Intercept</td>
<td>-0.02</td>
<td>0.98</td>
<td>0.935</td>
</tr>
</tbody>
</table>

**Bias due to non-response**

The following table compares the profiles of respondents to the main questionnaire and those completing a diary for the variables considered for the diary non-response model (weighted by the main survey weight). As can be seen, there are large discrepancies indicating a significant non-response bias for the diary sample. After non-response weighting, bias has been vastly reduced and the profile of those completing a diary comes into line with that of the main survey respondents (last column).

**Table 0.20: Diary non-response bias**

<table>
<thead>
<tr>
<th>Age group</th>
<th>Survey respondents</th>
<th>Diary respondents before NR weighting</th>
<th>Diary respondents after NR weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;=18</td>
<td>9.4</td>
<td>10.2</td>
<td>9.4</td>
</tr>
<tr>
<td>19</td>
<td>17.7</td>
<td>20.7</td>
<td>17.7</td>
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<tr>
<td>20</td>
<td>18.1</td>
<td>21.0</td>
<td>18.2</td>
</tr>
<tr>
<td>21</td>
<td>10.7</td>
<td>12.1</td>
<td>10.8</td>
</tr>
<tr>
<td>22-24</td>
<td>10.4</td>
<td>10.4</td>
<td>10.4</td>
</tr>
<tr>
<td>25+</td>
<td>33.5</td>
<td>25.7</td>
<td>33.5</td>
</tr>
</tbody>
</table>

**Location of institution**

<p>| England | 94.9 | 94.7 | 94.8 |</p>
<table>
<thead>
<tr>
<th>Status</th>
<th>Survey respondents</th>
<th>Diary respondents before NR weighting</th>
<th>Diary respondents after NR weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wales</td>
<td>5.1</td>
<td>5.3</td>
<td>5.2</td>
</tr>
<tr>
<td>Nation of living in the UK</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>England</td>
<td>94.7</td>
<td>94.6</td>
<td>94.9</td>
</tr>
<tr>
<td>Wales</td>
<td>5.3</td>
<td>5.4</td>
<td>5.1</td>
</tr>
<tr>
<td>Living in London</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London</td>
<td>18.4</td>
<td>16.4</td>
<td>17.1</td>
</tr>
<tr>
<td>Elsewhere</td>
<td>81.6</td>
<td>83.6</td>
<td>82.9</td>
</tr>
<tr>
<td>Qualification studying for</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BA, BSc, LLB, BEd or BA Ed (i.e. any Bachelor degree)</td>
<td>82.2</td>
<td>86.2</td>
<td>82.1</td>
</tr>
<tr>
<td>Foundation degree</td>
<td>8.0</td>
<td>5.8</td>
<td>8.0</td>
</tr>
<tr>
<td>other</td>
<td>9.8</td>
<td>8.0</td>
<td>9.9</td>
</tr>
<tr>
<td>Main subject</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Biological Sciences (including Psychology)</td>
<td>7.2</td>
<td>8.0</td>
<td>7.3</td>
</tr>
<tr>
<td>Business and Administrative Studies</td>
<td>7.4</td>
<td>5.9</td>
<td>7.2</td>
</tr>
<tr>
<td>Computer Sciences</td>
<td>3.6</td>
<td>3.8</td>
<td>3.7</td>
</tr>
<tr>
<td>Creative Arts and Design</td>
<td>8.5</td>
<td>9.0</td>
<td>8.6</td>
</tr>
<tr>
<td>Education</td>
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<td>8.3</td>
<td>9.3</td>
</tr>
<tr>
<td>Engineering and Technology</td>
<td>5.5</td>
<td>5.9</td>
<td>5.6</td>
</tr>
<tr>
<td>Historical and Philosophical studies</td>
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<td>4.4</td>
<td>3.5</td>
</tr>
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<td>5.0</td>
<td>4.2</td>
</tr>
<tr>
<td>Languages (including English and Classics)</td>
<td>4.7</td>
<td>5.8</td>
<td>4.9</td>
</tr>
<tr>
<td>Law</td>
<td>3.7</td>
<td>3.3</td>
<td>3.6</td>
</tr>
<tr>
<td>Social Studies (including Economics, Politics and Geography)</td>
<td>8.5</td>
<td>10.0</td>
<td>8.3</td>
</tr>
<tr>
<td>Medicine and Dentistry and allied subjects</td>
<td>11.7</td>
<td>11.8</td>
<td>11.5</td>
</tr>
<tr>
<td>Unsure/other</td>
<td>22.3</td>
<td>18.8</td>
<td>22.1</td>
</tr>
<tr>
<td>Marital status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Married (or in a civil partnership)</td>
<td>15.3</td>
<td>11.3</td>
<td>15.8</td>
</tr>
<tr>
<td>Living with a partner</td>
<td>7.7</td>
<td>7.4</td>
<td>7.9</td>
</tr>
<tr>
<td></td>
<td>Survey respondents</td>
<td>Diary respondents before NR weighting</td>
<td>Diary respondents after NR weighting</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------</td>
<td>----------------------------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>Single, never married</td>
<td>72.1</td>
<td>77.7</td>
<td>71.5</td>
</tr>
<tr>
<td>Divorced, separated or widowed</td>
<td>4.9</td>
<td>3.6</td>
<td>4.8</td>
</tr>
<tr>
<td><strong>Course length</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 year</td>
<td>3.8</td>
<td>3.6</td>
<td>4.1</td>
</tr>
<tr>
<td>2 years</td>
<td>11.1</td>
<td>8.3</td>
<td>11.3</td>
</tr>
<tr>
<td>3 years</td>
<td>58.3</td>
<td>60.2</td>
<td>57.5</td>
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<tr>
<td>4 years</td>
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<td>5 years</td>
<td>5.1</td>
<td>4.9</td>
<td>5.0</td>
</tr>
<tr>
<td>6 years or more</td>
<td>3.2</td>
<td>3.5</td>
<td>3.2</td>
</tr>
<tr>
<td><strong>Year of study</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st</td>
<td>25.6</td>
<td>24.7</td>
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</tr>
<tr>
<td>2nd</td>
<td>38.0</td>
<td>36.4</td>
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<td>3rd</td>
<td>26.8</td>
<td>28.9</td>
<td>27.7</td>
</tr>
<tr>
<td>4.00 4th or higher</td>
<td>9.6</td>
<td>10.0</td>
<td>9.7</td>
</tr>
<tr>
<td><strong>Living with adults who are financially dependant on respondent</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>5.5</td>
<td>4.5</td>
<td>5.7</td>
</tr>
<tr>
<td>No</td>
<td>94.5</td>
<td>95.5</td>
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<tr>
<td><strong>Have children</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>17.6</td>
<td>11.8</td>
<td>17.7</td>
</tr>
<tr>
<td>No</td>
<td>82.4</td>
<td>88.2</td>
<td>82.3</td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
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</tr>
<tr>
<td>Other or missing</td>
<td>26.6</td>
<td>22.4</td>
<td>25.9</td>
</tr>
<tr>
<td>White</td>
<td>73.4</td>
<td>77.6</td>
<td>74.1</td>
</tr>
<tr>
<td><strong>Illness or disability</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>yes</td>
<td>80.1</td>
<td>82.2</td>
<td>79.9</td>
</tr>
<tr>
<td>no</td>
<td>19.9</td>
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<td>20.1</td>
</tr>
<tr>
<td><strong>Religion</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>No religion</td>
<td>44.4</td>
<td>49.5</td>
<td>44.6</td>
</tr>
<tr>
<td>Christian</td>
<td>42.0</td>
<td>38.8</td>
<td>41.8</td>
</tr>
<tr>
<td>Other religion or missing</td>
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<td>11.7</td>
<td>13.6</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>42.3</td>
<td>43.7</td>
<td>43.0</td>
</tr>
<tr>
<td>Female</td>
<td>57.7</td>
<td>56.3</td>
<td>57.0</td>
</tr>
<tr>
<td><strong>Sector</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>English HEIs, full-time</td>
<td>63.2</td>
<td>70.6</td>
<td>62.9</td>
</tr>
</tbody>
</table>
Survey respondents | Diary respondents before NR weighting | Diary respondents after NR weighting
--- | --- | ---
English HEIs, part-time | 23.7 | 17.5 | 23.4
Welsh HEIs | 5.0 | 5.2 | 5.1
FECs | 3.5 | 2.6 | 3.7
Open University | 4.7 | 4.2 | 4.9

Post-stratification to HESA totals

To reduce any residual bias, the final adjustment to the weights was to bring those completing a diary into line with HESA. This final stage adjusted the existing weights (the previous components of weighting described above multiplied together) to HESA counts by age and sex within each of the same nine groups used for the post-stratification of the main sample. The population figures used for the calibration adjustment are the ones shown in section 3.2.

Distribution of the diary weights

The following table gives the distribution of the diary weights.

Table 0.21: Final distribution of diary weights

<table>
<thead>
<tr>
<th></th>
<th>English HEIs</th>
<th>Welsh HEIs</th>
<th>FECs</th>
<th>OU</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>1.33</td>
<td>0.17</td>
<td>0.25</td>
<td>-</td>
<td>0.89</td>
</tr>
<tr>
<td>Median</td>
<td>1.26</td>
<td>0.18</td>
<td>0.17</td>
<td>-</td>
<td>0.31</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>1.23</td>
<td>0.11</td>
<td>0.28</td>
<td>-</td>
<td>1.12</td>
</tr>
<tr>
<td>Minimum</td>
<td>0.001</td>
<td>0.01</td>
<td>0.005</td>
<td>-</td>
<td>0.001</td>
</tr>
<tr>
<td>Maximum</td>
<td>15.90</td>
<td>0.68</td>
<td>1.78</td>
<td>-</td>
<td>15.90</td>
</tr>
<tr>
<td>5th percentile</td>
<td>0.03</td>
<td>0.01</td>
<td>0.01</td>
<td>-</td>
<td>0.01</td>
</tr>
<tr>
<td>95% percentile</td>
<td>3.36</td>
<td>0.34</td>
<td>0.86</td>
<td>-</td>
<td>2.86</td>
</tr>
<tr>
<td><strong>Part-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>2.53</td>
<td>0.28</td>
<td>0.56</td>
<td>1.20</td>
<td>1.55</td>
</tr>
<tr>
<td>Median</td>
<td>1.86</td>
<td>0.27</td>
<td>0.40</td>
<td>1.09</td>
<td>0.95</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>2.38</td>
<td>0.18</td>
<td>0.61</td>
<td>0.44</td>
<td>1.87</td>
</tr>
<tr>
<td>Minimum</td>
<td>0.01</td>
<td>0.01</td>
<td>0.02</td>
<td>0.56</td>
<td>0.01</td>
</tr>
<tr>
<td>Maximum</td>
<td>11.61</td>
<td>0.80</td>
<td>3.48</td>
<td>2.40</td>
<td>11.61</td>
</tr>
</tbody>
</table>
### The effect of diary weights on effective sample size for key groups

The following table presents the effective sample sizes for full-time and part-time students for each sector and overall, followed by figures by domicile for the diary sample. Sample efficiency is lower for the diary sample (for subgroups and overall) compared to the main sample, because the variability of the diary weights is greater, given that they incorporate the main-survey weights.

**Table 0.22: Effect of diary weights on effective sample size for key groups**

<table>
<thead>
<tr>
<th>Sector</th>
<th>English HEIs</th>
<th>Welsh HEIs</th>
<th>FECs</th>
<th>OU</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>1339</td>
<td>648</td>
<td>197</td>
<td>-</td>
<td>2184</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>720</td>
<td>469</td>
<td>87</td>
<td>-</td>
<td>846</td>
</tr>
<tr>
<td>Effective as % of actual</td>
<td>54%</td>
<td>72%</td>
<td>44%</td>
<td>-</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Part-time</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>198</td>
<td>66</td>
<td>75</td>
<td>102</td>
<td>441</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>105</td>
<td>48</td>
<td>35</td>
<td>90</td>
<td>179</td>
</tr>
<tr>
<td>Effective as % of actual</td>
<td>53%</td>
<td>72%</td>
<td>46%</td>
<td>89%</td>
<td>41%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Domiciliation</th>
<th>English-domiciled</th>
<th>Welsh-domiciled</th>
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</thead>
<tbody>
<tr>
<td><strong>Full-time</strong></td>
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<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>1584</td>
<td>600</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>770</td>
<td>346</td>
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<tr>
<td>Effective as % of actual</td>
<td>49%</td>
<td>58%</td>
</tr>
<tr>
<td><strong>Part-time</strong></td>
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<td></td>
</tr>
<tr>
<td>Sample size</td>
<td>367</td>
<td>74</td>
</tr>
<tr>
<td>Effective sample size</td>
<td>167</td>
<td>39</td>
</tr>
<tr>
<td>Effective as % of actual</td>
<td>46%</td>
<td>52%</td>
</tr>
</tbody>
</table>
1.6.5 Profile of the weighted sample

The sample profiles for SIES 2011/12 and SIES 2007/08 are presented in Table 1.22 for all English-domiciled full-time and part-time students and in Table 1.23 for full-time first year students. There were some differences in terms of student characteristics, among fulltime students overall and among first year students. For example, although the gender and age profiles were similar, the 2011/12 sample contained a higher proportion of ethnic minority students.

Differences also occurred among part-time students (namely more students aged 25-39 and, probably reflecting these differences, more couples without dependent children and fewer single students). These differences may also be attributed to the fact that in SIES 2011/12, all part-time students studying over 25 per cent of a full time equivalent course were eligible for the study. In 2007/08, only those studying over 50 per cent of a full time equivalent course were eligible.

Table 0.23: Comparison of sample profiles, SIES 2007/08 and 2011/12, key student and HE study characteristics, all English-domiciled students

<table>
<thead>
<tr>
<th></th>
<th>Full-time</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>43</td>
<td>44</td>
<td>41</td>
<td>38</td>
</tr>
<tr>
<td>Female</td>
<td>57</td>
<td>56</td>
<td>59</td>
<td>62</td>
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<tr>
<td>Age group, full-time</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>(at start of academic year)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under-25</td>
<td>83</td>
<td>84</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>25 and older</td>
<td>17</td>
<td>16</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Age group, part-time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(at start of academic year)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under-25</td>
<td>-</td>
<td>–</td>
<td>28</td>
<td>14</td>
</tr>
<tr>
<td>25-39</td>
<td>-</td>
<td>–</td>
<td>38</td>
<td>66</td>
</tr>
<tr>
<td>40+</td>
<td>-</td>
<td>–</td>
<td>35</td>
<td>30</td>
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<tr>
<td>Ethnicity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Full-time</td>
<td></td>
<td>Part-time</td>
<td></td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------</td>
<td>----------</td>
<td>-----------</td>
<td>----------</td>
</tr>
<tr>
<td>White</td>
<td>83</td>
<td>75</td>
<td>89</td>
<td>84</td>
</tr>
<tr>
<td>Black/ Black British</td>
<td>4</td>
<td>8</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Asian / Asian British</td>
<td>7</td>
<td>11</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Mixed/ Other</td>
<td>5</td>
<td>7</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td></td>
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<tr>
<td>Dependent</td>
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<td>70</td>
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<tr>
<td>Independent</td>
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<td>100</td>
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<tr>
<td><strong>Family type</strong></td>
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<td></td>
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<tr>
<td>Single</td>
<td>85</td>
<td>86</td>
<td>39</td>
<td>30</td>
</tr>
<tr>
<td>Couple without children</td>
<td>7</td>
<td>4</td>
<td>26</td>
<td>33</td>
</tr>
<tr>
<td>Lone parent family</td>
<td>2</td>
<td>3</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Two-adult family</td>
<td>6</td>
<td>7</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td><strong>Location of study</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>England</td>
<td>97</td>
<td>97</td>
<td>84</td>
<td>81</td>
</tr>
<tr>
<td>Wales</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>+</td>
</tr>
<tr>
<td>Open University</td>
<td>n/a</td>
<td>n/a</td>
<td>15</td>
<td>19</td>
</tr>
<tr>
<td><strong>Year of study</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>First year</td>
<td>32</td>
<td>23</td>
<td>33</td>
<td>23</td>
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<tr>
<td>Intermediate years</td>
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<td>41</td>
<td>31</td>
<td>39</td>
</tr>
<tr>
<td>Final year / one-year course</td>
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<td>36</td>
<td>36</td>
<td>38</td>
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<tr>
<td><strong>Whether lives with parents</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lives at home / with parents</td>
<td>24</td>
<td>25</td>
<td>23</td>
<td>13</td>
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<tr>
<td>Lives away from home</td>
<td>76</td>
<td>75</td>
<td>77</td>
<td>87</td>
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Table 0.24: Comparison of sample profiles, SIES 2007/08 and 2011/12, key student and HE study characteristics, English-domiciled full-time students

<table>
<thead>
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<th>2007/8</th>
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<tr>
<td><strong>Gender</strong></td>
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<tr>
<td>Male</td>
<td>44</td>
<td>46</td>
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<tr>
<td>Female</td>
<td>56</td>
<td>54</td>
</tr>
<tr>
<td><strong>Age group, full-time</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(at start of academic year)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under-25</td>
<td>84</td>
<td>88</td>
</tr>
<tr>
<td>25 and older</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>82</td>
<td>74</td>
</tr>
<tr>
<td>Black/ Black British</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Asian / Asian British</td>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>Mixed/ Other</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td><strong>Family type</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>85</td>
<td>90</td>
</tr>
<tr>
<td>Couple without children</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Lone parent family</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Two-adult family</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td><strong>Location of study</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>England</td>
<td>98</td>
<td>97</td>
</tr>
<tr>
<td>Wales</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Open University</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>
Whether lives with parents

<table>
<thead>
<tr>
<th></th>
<th>2007/8</th>
<th>2011/12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lives at home / with parents</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Lives away from home</td>
<td>75</td>
<td>75</td>
</tr>
</tbody>
</table>

As described, the achieved sample has been weighted to match the population in terms of gender, age, part-time/full-time status, domicile and institution type. These were the variables that were deemed to be most important, in terms of measuring student finance. On other variables, such as ethnicity, there will be some differences between the achieved sample and HESA population figures (see Table 1.24 below). These differences can be attributed to either random sampling error or to non-response.

### Table 0.25: Comparison of sample profile SIES 2011/12 and HESA population figures 2010/11

<table>
<thead>
<tr>
<th></th>
<th>SIES 2011/12 Full-time</th>
<th>HESA population figures</th>
<th>SIES 2011/12 Part-time</th>
<th>HESA population figures</th>
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</thead>
<tbody>
<tr>
<td>Ethnicity</td>
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<td></td>
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<tr>
<td>White</td>
<td>75</td>
<td>79</td>
<td>84</td>
<td>86</td>
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<tr>
<td>Ethnic minority</td>
<td>25</td>
<td>21</td>
<td>16</td>
<td>14</td>
</tr>
</tbody>
</table>

### 1.7 Conducting analysis

In conducting analysis of SIES data for the main report, all percentages and means quoted are based on weighted data. The unweighted number of cases on which figures are based is also included. All regression analyses were also carried out on weighted data.

Thirty was taken as the minimum subgroup size for which percentages and means could be quoted. Figures based on subgroup sizes of less than 50 are shown in brackets. In the regression analysis, 30 was again taken as the minimum subgroup size that would be included in the analysis. If a category was smaller than this, it was either:

a. merged with another category where this was meaningful to do so (and where it resulted in a larger subgroup with 30 or more respondents)

b. excluded from the analysis, if no options for collapsing categories were available.
All cross-tabulation, description of means, regression analysis and significance testing for the main report was carried out using SPSS. Commands from the Complex Samples procedures were used, to ensure the correct treatment of complex sampling weights in these procedures.
Appendix 1 – Questionnaire

Student Income and Expenditure Survey
2011/12 Questionnaire

Prepared for the Department for Business, Innovation and Skills

February 2012
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5.5 Money and gifts .......................................................................... 98
5.6 Savings ....................................................................................... 99
5.7 Miscellaneous income ............................................................... 100
5.7.1 Maintenance payments ........................................................... 100
5.7.2 Other ..................................................................................... 100
5.7.3 Sale of books etc. ................................................................... 100
## COMMERCIAL CREDIT/OVERDRAFT

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<tbody>
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</tr>
<tr>
<td>6.2</td>
<td>Commercial loans</td>
</tr>
<tr>
<td>6.3</td>
<td>Credit/store cards</td>
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## EXPENDITURE

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</tr>
<tr>
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<td>General</td>
</tr>
<tr>
<td>7.1.2</td>
<td>Last summer vacation</td>
</tr>
<tr>
<td>7.2</td>
<td>Council Tax</td>
</tr>
<tr>
<td>7.3</td>
<td>Household expenditure/bills</td>
</tr>
<tr>
<td>7.4</td>
<td>Telephones/mobile phones</td>
</tr>
<tr>
<td>7.5</td>
<td>Travel</td>
</tr>
<tr>
<td>7.6</td>
<td>Books and equipment</td>
</tr>
<tr>
<td>7.6.1</td>
<td>Books, workbooks, papers and pamphlets</td>
</tr>
<tr>
<td>7.6.2</td>
<td>Photocopying and stationery</td>
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<tr>
<td>7.6.3</td>
<td>Computers</td>
</tr>
<tr>
<td>7.6.4</td>
<td>Special equipment, clothing and materials</td>
</tr>
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<td>7.7</td>
<td>Child related expenditure</td>
</tr>
<tr>
<td>7.7.1</td>
<td>General</td>
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<td>7.7.2</td>
<td>Childcare</td>
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<td>7.8</td>
<td>Other expenditure</td>
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</table>

## BACKGROUND

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<tbody>
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<td>Remaining student background</td>
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<td>Previous education</td>
</tr>
<tr>
<td>8.1.2</td>
<td>Parental HE background</td>
</tr>
<tr>
<td>8.1.3</td>
<td>NS-SEC (or student background)</td>
</tr>
<tr>
<td>8.2</td>
<td>Other</td>
</tr>
<tr>
<td>8.3</td>
<td>Re-contacting</td>
</tr>
</tbody>
</table>
1.8 Screening questions and course details

INTRO: Thank you for agreeing to take part in this study. We will now ask you some questions about your income and expenditure. Please do your best to answer questions as accurately as you can.

{Ask all, except OU students}
UNI
Are you currently registered and attending courses at (NAME OF INSTITUTION)?
Yes
No
{Don’t know or refusal are not allowed}

{Ask if UNI=No}
UNI2
Are you currently registered at (NAME OF INSTITUTION), even though you may be attending courses elsewhere?
Yes
No (CLOSE INTERVIEW)
{Don’t know or refusal are not allowed}

{Ask all OU students}
OUČOU
Are you currently registered and still studying for a module/qualification with the Open University?
Yes
No (CLOSE INTERVIEW)
{Don’t know or refusal are not allowed}

{Ask all, except OU students}
FTPT
Is your course full-time or part-time? *If you are on a sandwich course, please answer ‘full time’.*
(INTERVIEWER: CODE SANDWICH STUDENTS AS ‘Full-time’)
Full-time
Part-time

{Ask if FTPT=part time, except OU students}
PT2
Does your course last at least 1 academic year and is it equivalent to 25% or more of a full-time course?
INCLUDE IN INFORMATION BOX: If you are on a part-time course worth 50% of a full-time course, you would expect to finish the course in no more than twice the time it would take a full-time student to do the course. One year of a part-time course worth 50% of a full-time course is equivalent to 60 credits.
Yes – my course is equivalent to 75% (or above) of a full time course
Yes – my course is equivalent to between 50% and 74% of a full time course
Yes – my course is equivalent to between 25% and 49% of a full time course
No – my course is equivalent to 24% (or less) of a full time course (CLOSE INTERVIEW)
{Don’t know or refusal are not allowed}

{Ask if FTPT=part time and OU students}
PTWHY
Why did you choose to study part-time (with the OU)? Please tick all that apply.
Only option available / no suitable full-time course available
Had a full time job / wanted to continue working
Have family commitments / caring for household member
Had to study part-time to avoid reductions in social security benefits/allowances
Could not afford to study full time
Because of the new student funding regime
Did not have entry qualifications to study full-time course
Other reason (Please specify)

{Ask if PTWHY=OTH}
PTWHYSP
Please specify.
Open type answer

{Ask all}
YRTOTAL
How many years in total is your current course or programme?
If you are studying towards a foundation degree, please only include your time on this course; do not include any other course you are planning to do afterwards.
If you have a foundation degree, please do not include this in the total number of years.
Numeric answer: Range 1 to 12
{Check if course lasts more than 6 years “This is a long course, are you sure that it will last for X years?”}

{Ask OU Students}
YRTOTALOU
How many years are you planning to take to complete your studies at the Open University?
Numeric answer: Range 1 to 20
YRNOWC
What year of your course are you currently studying. Is it the first year, the second etc? (IF PART TIME, ADD: Please tell us the number of years you have been studying.) If you are on a sandwich course, please include your placement year as a year of study. If you have had to repeat any years of your course, this should be included as a year of study. If you have done a foundation course, please do not include this in the total number of years you have been studying.
Year 1
Year 2
Year 3
Year 4
Year 5
Year 6
Year 7
Year 8 or more

YRNOWO
How many years have you been studying with the Open University? Please do not include any breaks in study.
1 year
2 Years
3 Years
4 Years
5 Years
6 Years
7 Years
8 Years or more

SAND
Can I check, is your course a sandwich course? A sandwich course is one which combines academic study with a period of time spent working in industry e.g. a year out of study on a work placement.
Yes
No
{Don’t know or refusal are not allowed}

SANDJOB
Have you earned, or will you earn, any money at all from a paid placement for your sandwich course during this academic year that is between DATE and DATE?
Yes (CLOSE INTERVIEW)
No
{Don’t know or refusal are not allowed}

{Ask all OU students}
OUREG
In which year did you first register with the OU?
ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.
Numeric: Range 1969 to 2011
{Don’t know or refusal are not allowed}

{Ask all OU students}
OUNUM
How many Open University modules are you currently studying on or registered for?
Numeric: Range 1 to 6
{Don’t know or refusal are not allowed}

{Ask all OU students. Repeat for the number of courses the student is taking}
OUST
When does/did the (first/second etc) modules start?
INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.
ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.
Datatype answer
{Don’t know or refusal are not allowed}

{Ask all OU students. Repeat for the number of courses the student is taking}
OUF
When does/did the (first/second etc) modules end?
INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.
ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.
Datatype answer
{Don’t know or refusal are not allowed}

{Ask all OU students}
OUCRED
(Is/ Are) the (module or modules) you are studying towards worth at least 30 credits per year?
Yes – worth 90 credits (or above)
Yes – worth between 60 and 89 credits
Yes – worth between 30 and 59 credits
No – worth 29 credits (or less) (CLOSE INTERVIEW)
{Don’t know or refusal are not allowed}
{Ask all}
UKRES
Were you living in the United Kingdom for the three years before the start of your course - we mean was the United Kingdom your home even if you were travelling or working abroad some of this time? If you are from the Channel Islands or Isle of Man, please answer ‘yes’. If you are an overseas or European Union student, please answer ‘no’.
Yes – ordinarily resident
No (CLOSE INTERVIEW)
{Don’t know or refusal are not allowed}

{Ask all}
UKDOMP
Immediately before you started the course, in which nation were you living in the United Kingdom. Again we mean which country was your home even if you were travelling or working abroad over the summer. Was it...
England
Wales
Scotland (CLOSE INTERVIEW)
Northern Ireland (CLOSE INTERVIEW)
Or the British Islands e.g. the Channel Islands or the Isle of Man?
{Don’t know or refusal are not allowed}

{Ask if they attend an English University/college or are OU students}
LOND
ASK OR CODE:
(If not OU in term-time) Do you live in London or elsewhere in England (If WELSH DOMICILED, add: or Wales)?
London
Elsewhere

{Ask all}
QUAL
What are you currently studying for?
BA, BSc, LLB, BEd or BA Ed (i.e. any Bachelor degree)
Foundation degree
PGCE / Initial Teacher Training
Dip HE (Diploma of Higher Education)
HND (Higher National Diploma)
HNC (Higher National Certificate)
Certificate of Higher Education
University Certificate
University Diploma
Other, e.g. any postgraduate course other than PGCE, any qualification below University Certificate/Diploma (CLOSE INTERVIEW)
{Don't know or refusal are not allowed}

{Ask all}
SUBJECT2
How would you describe your main subject?
Agriculture and related subjects
Architecture, Building and Planning
Biological Sciences (including Psychology)
Business and Administrative Studies
Computer Sciences
Creative Arts and Design
Education
Engineering and Technology
Medicine and Dentistry
Subjects allied to Medicine (including nursing)
Veterinary Science
Physical Sciences (including Chemistry and Physics)
Mathematical Sciences
Historical and Philosophical studies
Mass Communications and Documentation
Languages (including English and Classics)
Law
Social Studies (including Economics, Politics and Geography)
Combined
Unsure/other

{Ask if “other/unsure” is coded}
SUBJECT3
PLEASE WRITE IN NAME OF COURSE OF QUALIFICATION OR DEPARTMENT
Open answer

{Ask if SUBJECT2=Medicine and Dentistry or Subjects Allied to Medicine or Unsure/Other}
NHS1
Are you studying on an NHS funded health professional course?
Yes
No

{Ask if NHS=1}
NHSBURS
Have you received, or do you expect to receive any money as an NHS Bursary this academic year? (INSTRUCTION TO APPEAR IF SUBJECT 2=MEDICINE OR DENTISTRY: Medical and dental students on standard 5 or 6 year courses may be
eligible for NHS Bursaries to help with tuition fees in their 5th and further years of study. They can also receive 50% of the full loan in these later years of study.

Yes
No

{Ask if FTPT=FT}
ABROAD1
As part of your course do you have to attend an education institution outside the UK?
Yes
No

{Ask if ABROAD1=Yes)
ABROAD2
During this academic year that is between DATE and DATE, do you have to attend an education institution outside the UK for at least eight weeks continuously?
Yes
No

{Ask all students}
SLDEBT
Had you studied on another higher education course/qualification previously, before the course that you are studying for now? This includes study for bachelor and foundation degrees, PGCE and teacher training, Dip HE, HNCs, HNDs, Certificates of Higher Education and University Certificates and Diplomas. Please include higher education courses that were started but not completed.
Yes
No

IF SLDEBT=YES AND QUAL does not = PGCE AND SUBJECT2 does not = Medicine and Dentistry
SLDEBT2
What was the highest qualification you had at the start of your current course? Please tick one box only
Degree or post graduate qualification – INELIGIBLE
Other HE qualification (e.g. HND/HNC, foundation degree/foundation course, Undergraduate diploma or certificate/other)

1.9 Background
{Ask all}
AGE
How old were you at the start of this academic year?
{Check to come up if student is younger than 18 or older than 30}
{Ask if AGE refused}
AGE2
Are you aged
  • 24 or under
  • 25 or above?
{DON'T ALLOW DK OR REFUSAL}

{Ask all}
MARITAL
Are you ...
Married and living with a husband/wife
Living with a partner
Single, never married
Divorced or separated
Widowed?

{Ask if student is married or lives with partner}
FINJ1
Do you share joint financial responsibility with your partner, for example by regularly sharing the costs of housing or other essential expenditure? If you live with other people as well as your partner, and you share your costs equally with your partner AND others in the house, please answer ‘no’.
Yes, share responsibility for housing or other essential expenditure
No

{Ask if aged under 25 and if Marital=single or living with partner}
SUPFIN
Thinking about the three years (or more) prior to the start of the first academic year of your course, would you say that you completely supported yourself financially? This could be, for example, by working full time or receiving benefits. If your parents paid for your living costs during this period, please answer no to this question.
Yes
No

{Ask all}
DEPAD
Do you live with any adults who depend on you financially? Please do not include grown up children aged 18 or over.
Yes
No
{Ask all}

CHILDHH
Do you have any children of your own living with you who are aged 16 or under, or in full-time education and aged 17 or 18? If you live away from home during the week, but live with your child at the weekend, please answer 'yes'.
Yes
No

{Ask if CHILDHH=YES}
CHNO
How many?
Numeric: Range 1 to 15

{Ask if CHILDHH=YES. Repeat for the number of children they have}
CHAGE
How old is the (first, second, third etc) child?
Numeric: Range 0 to 18

{Ask all}

CHABS
Do you have any children of your own aged 16 or under, or in full-time education and aged 17 or 18, who do not live with you?
Yes
No

{Ask if FINJ1=YES}
PARTCH1
Does your spouse/partner have any children that you have not already told me about aged 16 or under, or in full-time education and aged 17 or 18, who live with you in your household?
Yes
No

{Ask if PARTCH1=YES}
PCHNO
How many?
Numeric: Range 1 to 15

{Ask if PARTCH1=YES. Repeat for the number of children they have}
PCHAGE
How old is the (first, second, third etc) child?
Numeric: Range 0 to 18

{Ask if FINJ1=YES}
PARTCH2
Does your spouse/partner have any children aged 16 or under, or in full-time education and aged 17 or 18, who do not live with you in your household?
Yes
No

Independent and dependent students are defined as follows:

*Independent students:*
  a) They are part-time students (at FTPT)
  OR
  b) They are full-time students aged 25+ (DOB)
  c) They are full-time students who are married (MARITAL)
  d) They are full-time students who are financially independent for 3 years prior to course (SUPFIN)
  e) They have children of their own living with them who are aged 16 or under, or in full-time education and aged 17 or 18 (CHILDHH)

*Dependent students:*
  They are full-time students:
  a) Aged under 25 (DOB)
  b) Unmarried (MARITAL)
  c) Not financially independent for 3 years prior to course (SUPFIN)
  d) Do not have children of their own living with them who are aged 16 or under, or in full-time education and aged 17 or 18 (CHILDHH)
1.10 Fees

{Section not to be asked of students receiving NHS bursary – i.e. where NHSBURS=yes}

1.10.1 Fee amount

{Ask all}

INTRO
The next few questions are about tuition fees.

{Ask if FTPT=full time}

FULLFEE (currently named “CRSFEEF”)
Does your college or university charge the standard amount of tuition fees for your course, that is £3,375? *Please tell us the amount your college/ university charges, rather than the amount you personally pay if this is different.*
Yes
No

{Ask if FULLFEE=no or FTPT=part time}

CRSFEEF (currently named “CRSAMT”)
How much are the tuition fees for your course/(TEXT FILL IF OU modules(s) in this academic year? Please tell us the amount the (college/ university (TEXT FILL IF OU Open University) charges before any reductions via financial support, rather than the amount you personally are charged, which might be different. *If you are not sure of the exact amount, please give your best estimate. Please enter the amount without any £ signs or commas, for example, 1500.*
Numeric answer: range 0 to 10,000

1.10.2 Paying fees – Full time students

{Ask if FTPT=full time and IF FULLFEE=yes}

FULLLOAN (currently named “FLOAN”)
Have you used (or do you expect to use) a tuition fee loan to cover the full amount of your fees for this academic year (2011-2012), that is £3,375?
Yes
No

{Ask if FTPT=full time and FULLFEE=no or FULLLOAN=No}

FLOAN (currently named “FLOANANY”)
Have you used (or do you expect to use) any tuition fee loan to cover the cost of your fees for this academic year (2011-2012)?
Yes
No

{Ask if FLOAN=yes}
FLOANAMT
How much tuition fee loan have you used (or do you expect to use) for this academic year (2011-2012)? Please enter the amount without any £ signs or commas, for example, 1500.
1....100000
(Check – should not exceed amount of fees charged)

{Ask IF FLOANAMT is less than (£3375 IF FULLLOAN =NO) OR (CRSFEEF IF ANSWERED)}

DTFWHO
Who else has contributed something towards the costs of your tuition fees this academic year – we are only asking about financial help with your tuition fees and not any help with general living expenses? TICK ALL THAT APPLY

Welsh Government’s tuition fee grant (WELSH DOMICILED ONLY AND STUDYING IN WALES)
Myself, including any loans you have taken out for fees
My parent(s)/step parent(s)
Spouse or partner
Another relative
My employer
The university or college I am studying at
I received an NHS bursary, so my fees are paid
Or someone else or another organisation?

{Ask all who answer at DTFWHO, except ‘I received an NHS bursary, so my fees are paid’. Repeat for each person or organisation coded as contributing towards tuition fees}

DTFWHAM
How much has (XXXX person/org that contributed to fees) paid towards your tuition fees this academic year. ADD IF UNI/COLLEGE: Please include any money that your university or college has already taken off tuition fees. But don’t count any money you get from your university or college that is not specifically for tuition fees. If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to {textfill: fee amount}
Check – total should not exceed CRSAMT or £3375

1.10.3 Paying fees – Part time students (except OU)

{Ask if FTPT=part time EXCLUDING OU}
CRSGRA
This academic year, have you received, or do you expect to receive, a Fee Grant from the Student Loans Company towards the costs of your tuition fees? Part time students may be eligible for a fee grant. For more information, please click on the box below.
Yes
No
INFORMATION BOX

Part-time students can apply for a Fee Grant. These are paid directly to your university or college and don’t have to be paid back.

How much you get depends on your circumstances, household income and course ‘intensity’. ‘Intensity’ is how long the course takes to complete compared with an equivalent full-time course.

The amounts shown below can increase if you have a partner or children.

<table>
<thead>
<tr>
<th>Household income - single student without children</th>
<th>Fee Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>under £16,845</td>
<td>£820-£1,230</td>
</tr>
<tr>
<td>£16,845</td>
<td>£770-£1,180</td>
</tr>
<tr>
<td>£16,846-£25,420</td>
<td>£50-£820</td>
</tr>
<tr>
<td>over £25,420</td>
<td>no fee grant</td>
</tr>
</tbody>
</table>

The amount available to Welsh students varies slightly:

<table>
<thead>
<tr>
<th>Household income - single student without children</th>
<th>Fee Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>under £16,865</td>
<td>£670-£1,000</td>
</tr>
<tr>
<td>£16,865</td>
<td>£620-£950</td>
</tr>
<tr>
<td>£16,866-£25,435</td>
<td>£50-£950</td>
</tr>
<tr>
<td>over £25,436</td>
<td>no fee grant</td>
</tr>
</tbody>
</table>

{Ask if CRSGRA=yes}
CRSAM
And how much fee grant have you received this academic year from the Student Loans Company?
Numeric answer: range 1 to 2000

{Ask if CRSAM is less than CRSAMT or if CRSGRA=no}
CRSOTH
Who paid the (remaining) costs of your tuition fees this academic year? We are only asking about financial help with your tuition fees and not any help with general living expenses, books or equipment. If you paid your tuition fees yourself, but expect to be reimbursed by an employer or organisation, please count this as their payment not your own. …
TICK ALL THAT APPLY
Myself, including any loans you have taken out for fees
My parent(s)/step parent(s)
Spouse or partner
Another relative
My employer
The university or college I am studying at
Or someone else or another organisation?

{Ask where responded to CRSOTH. Repeat for all options}
CRSAM2
How much has been or will be paid by {CRSOTH answer} this academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 15000
Check – should not exceed CRSFEEF

1.10.4 Paying fees – OU students

CRSOU
Who paid the costs of your Open University tuition fees this academic year? We are only asking about financial help with your tuition fees and not any help with general living expenses, books or equipment. If you paid your tuition fees yourself, but expect to be reimbursed by an employer or organisation, please count this as their payment not your own.

TICK ALL THAT APPLY
Myself, including any loans you have taken out for fees
My parent(s)/step parent(s)
Spouse or partner
Another relative
My employer
The Open University
Or someone else or another organisation?

{Ask where responded to CRSOTH. Repeat for all options}
CRSOUAM
How much has been or will be paid by {CRSOU answer} this academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 15000

1.10.5 Support from universities
Did your university or college pay something towards the costs of your tuition fees through… TICK ALL THAT APPLY For more information, please click on the box below.
A bursary or scholarship,
A fee waiver,
Or through the Additional Fee Support Scheme? {Part time students only}
Other

Information Box

The Government provides funding through the Additional Fee Support Scheme, so that students receiving a fee grant that is less than their full fees can request a further contribution towards the balance of their fees if they are unable to pay it all themselves. This scheme may be referred to at some institutions as the Access to Learning Fund.
1.11 Higher education related income

{NB students receiving NHS Bursaries from DoH/NHS Wales will not be asked questions in this section unless it is explicit in the routing of the questions}

INTRO
We are now going to ask you about various different types of financial support you can receive from (IF ON NHS COURSE: the Department of Health or NHS Wales), the Student Loans Company, your university or other student organisations.

1.12 Range of support received – full time students

1.12.1 Loan – full time only (not if NHSBURS=yes)

{Ask if FTPT=full time}

SLOAN
"Have you received or do you expect to receive any student loan for maintenance from the Student Loans Company/ NHS this academic year? Please do not include any grants or bursaries that you may have received - we will ask about these later. For more information about student loans for maintenance, please click on the please click on the blue icon.

Yes
No

Information Box

Full-time students can apply for a Maintenance Loan to help with living costs. These are paid directly into your bank account at the start of each term, once you've registered on your course.

The amount you get depends on your household income, where you live and whether you receive any grants.

You can apply for 72 per cent of the Maintenance Loan without taking your family income into account. How much you get of the remaining 28 per cent depends on your family income.

Maximum Maintenance Loan Rates for English Students:

<table>
<thead>
<tr>
<th>Where you live</th>
<th>Maintenance Loan</th>
</tr>
</thead>
<tbody>
<tr>
<td>you live at home</td>
<td>£3,838</td>
</tr>
<tr>
<td>you live away from home and study outside London</td>
<td>£4,950</td>
</tr>
</tbody>
</table>
you live away from home and study in London £6,928

**Maximum Maintenance Loan Rates for Welsh students:**

<table>
<thead>
<tr>
<th>Where you live</th>
<th>Maintenance Loan</th>
<th>Maintenance Loan (Final Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>you live at home</td>
<td>£3,673</td>
<td>£3,324</td>
</tr>
<tr>
<td>you live away from home and study outside London</td>
<td>£4,745</td>
<td>£4,396</td>
</tr>
<tr>
<td>you live away from home and study in London</td>
<td>£6,648</td>
<td>£6,053</td>
</tr>
<tr>
<td>Studying overseas</td>
<td>£5,658</td>
<td>£4,920</td>
</tr>
</tbody>
</table>

{Ask if SLOAN=yes}

LAM1
How much will you receive this academic year. You can answer for the whole academic year or by term, how would you prefer to give your answer?
- Academic year
- Term

LAM2
How much loan for maintenance will you receive? *Please only give the amount of your student loan for maintenance, excluding any student loan for fees or additional allowances you may have applied for. If you are unsure, please give your best estimate.*
Numeric range: 0 to £6,928

1.12.2 Additional Loan for longer courses – full time only (not if NHSBURS=yes)

{Ask if SLOAN=yes}

LWEEKS1
Have you received, or do you expect to receive, any additional weeks’ allowances as part of your student loan for maintenance this academic year because your course is longer than 30 weeks? *For more information, please click on the blue icon.*
- Yes
- No

**Information Box**
As some courses have longer academic years than other courses, the additional weeks’ allowance is available for each extra week above the set limit of 30 weeks and 3 days (not including vacation periods).

{Ask if LWEAKS1=yes}
LWEEKS2
How much do you expect to receive in additional weeks’ allowances alongside your student loan for this academic year? You can answer for the whole academic year or per week, how would you prefer to give your answer?

- Academic year
- Per week

LW2
How much will you receive?

{All those who gave their answers in weeks to LWEEKS2}
LWEEKS4
How many additional weeks above 30 weeks does your course run for? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 22

1.12.3 Maintenance Grant – full time only (not if NHSBURS=yes)

{Ask if FTPT=full time}
MTNGE
Have you received, or do you expect to receive, any money as part of a Maintenance Grant (or Special Support Grant) from the Student Loans Company/ NHS this academic year? For more information, please click on the blue icon.

MTNGW
IF WELSH Have you received, or do you expect to receive, any money as part of a Welsh Assembly Learning Grant or a Maintenance Grant (or Special Support Grant) from the Student Loans Company/ NHS/ Welsh Government this academic year? For more information, please click on the blue icon.

Yes
No

Information Box

Full-time students can apply for a Maintenance Grant to help with living costs. These are paid directly into your bank account at the start of each term, once you've
registered on your course.

If you get help from the Maintenance Grant you don’t need to borrow as much through the Maintenance Loan and will have less to repay.

<table>
<thead>
<tr>
<th>Household income</th>
<th>Maintenance Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>under £25,000</td>
<td>£2,906</td>
</tr>
<tr>
<td>£25,001-£50,020</td>
<td>£50-£820</td>
</tr>
<tr>
<td>over £50,020</td>
<td>no grant</td>
</tr>
</tbody>
</table>

Other maintenance support

If you qualify for certain benefits (like Income Support), you may get the Special Support Grant instead of the Maintenance Grant. You get the same amount but it doesn’t reduce how much Maintenance Loan you can get.

Assembly Learning Grant (Wales only)

The amount of Assembly Learning Grant available to you depends on your income and that of your parents or partner. It also depends on when you first started your course.

If you started your course in 2010/11

<table>
<thead>
<tr>
<th>Total annual household income</th>
<th>Assembly Learning Grant available</th>
</tr>
</thead>
<tbody>
<tr>
<td>£18,370 or less</td>
<td>Full £5,000 grant</td>
</tr>
<tr>
<td>Between £18,371 and £50,020</td>
<td>Partial grant</td>
</tr>
<tr>
<td>Over £50,020</td>
<td>No grant</td>
</tr>
</tbody>
</table>

If you started your course in 2009/10 or earlier

<table>
<thead>
<tr>
<th>Total annual household income</th>
<th>Assembly Learning Grant available</th>
</tr>
</thead>
<tbody>
<tr>
<td>£18,370 or less</td>
<td>Full £2,906 grant</td>
</tr>
<tr>
<td>Between £18,371 and £39,329</td>
<td>Partial grant</td>
</tr>
<tr>
<td>Over £39,329</td>
<td>No grant</td>
</tr>
</tbody>
</table>

The Assembly Learning Grant is normally paid in three installments – one at the start of each term – straight into your bank or building society account. It is a grant which does not need to be paid back. You can only receive either the Assembly Learning Grant OR the Special Support Grant, not both. Which you receive depends on whether or not you are able to claim certain income-related benefits.
MGP1
How much Maintenance Grant (or Special Support Grant) will you receive over the whole academic year - you can answer for the whole academic year or per term? If you are not sure of the exact amount, please give your best estimate. FOR WELSH STUDENTS: How much Welsh Assembly Grant, Higher Education Grant or Maintenance Grant (or Special Support Grant) will you receive over the whole academic year? You can answer for the whole academic year or per term, how would you prefer to give your answer?
- Academic year
- Per term

MGP2
How much grant will you receive? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 2906

1.12.4 NHS Bursary (only if NHSBURNS=yes)

(Ask if NHSBURNS=yes)

NHSB1
Thinking about the **standard NHS bursary**, how much will you receive or do you expect to receive in this academic year? You can answer for the whole academic year or per term How would you prefer to give your answer? For more information, please click the blue icon.
- Academic year
- Per month

**Information box**

There are two types of non repayable NHS Bursary:
- Non income assessed bursary
- Income assessed bursary

A non income assessed bursary is available to students studying the following courses:
- Diploma in Nursing
- Diploma in Midwifery
- Diploma in Operating Department Practice

Student studying other courses are entitled to apply for the income-assessed bursary based upon their household income. Eligible courses include:
- Undergraduate medical or dental course in year 5 or beyond
- Postgraduate medical or dental course in years 2, 3 or 4
- Nursing and Midwifery degree level (this list is not exhaustive)
NHSB12
How much will you receive? Please only give the amount of your basic Bursary, not any additional allowances or any student loan you may have applied for. If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10,000

{Ask if NHSBURS=yes}

LNHSXW1
Do you get or expect to get any money in additional weeks' allowances alongside your NHS Bursary? For more information, please click on the box below.
Yes
No

Information box
As many health professional courses have longer academic years than other courses, the additional weeks' allowance is available for each extra week above the set limit of 30 weeks and 3 days (not including vacation periods).

LNXW2
How much will you receive?: 1..1000

{Ask if LNHSXW1=yes}

LNHSXW2
How much extra weeks allowance do you receive or expect to receive in this academic year - You can answer for the whole academic year or per week, how would you prefer to give your answer?
• Academic year
• Per week

{Ask students who gave their answers to LNHSXW2 in weeks}

LNHSXW4
How many additional weeks above 30 weeks does your course run for? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 22

{Ask if NHSBURS=yes}

NHSBA1
Do you receive any of the following allowances in addition to the standard Bursary? Please tick all of these you receive or expect to receive in this academic year.
• Older Students
• Dependents
• Single parents
• Disabled Students
• Hardship Grant
• Childcare allowance
• Parents Learning Allowance
• Two homes grant
• Initial Expenses
• Practice Placement Expenses
• None of these

{Ask students who receive extra allowances at NHSBA1}

NHSBA2
How much will you receive in total from these allowances – you can answer for the whole academic year or per month, how would you prefer to give your answer?
• Academic year
• Per month

NHSBA2A
How much will you receive?
Please give your best estimate if you are unsure.@/"
Numeric answer: range 1 to XXX

{QUERY: please note no questions about student loan for fees included for NHS bursary students, assuming that their fees are always paid}{Ask full-time students who have received/will receive DOH / NHS Wales support through the NHS}{Ask if NHSBURS=yes}

NHSL1
Have you applied for or will you apply for a student loan for maintenance through your Local Authority (or Student Loans Company)?
Yes
No

{Ask if NHSL1=yes}

NHSL2
Over the whole academic year, how much student loan for maintenance will you receive or do you intend to apply for?
Numeric answer: range 1 to XXXXX
1.12.5 Career Development Loan (not if NHSBURES=yes)

{Ask all those full time where SLOAN=no and all part time students.}
CDL
Have you received, or do you expect to receive, any money as part of a Career Development Loan this academic year – this would be a loan from a bank? For more information, please click on the blue icon.
Yes
No

Information box

A Professional and Career Development Loan is a bank loan. You make an agreement with a participating bank to borrow an amount between £300 and £10,000. Then once you’ve stopped studying, you pay it back in the normal way.

The difference with a Professional and Career Development Loan is that the Skills Funding Agency pays the interest on the loan while you’re studying – and for one month afterwards.

Currently, banks offer Professional and Career Development Loans at a reduced customer rate of 9.9% per annum, equivalent to a typical APR of 5-6% over the lifetime of the loan.

{Ask if CDL=yes}
CDLAM
How much Career Development Loan will you receive over the academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 10,000

{Ask if CDL=yes}
CDLP1
Is this loan to cover this academic year/course only, or does it cover a greater amount of time?
This academic year/course
Greater period of time

{Ask if CDLP1=Greater period of time}
CDLP2
What date did you receive this loan?
Enter month and year

{Ask if CDLP1=Greater period of time}
1.2 Course Grant – part time only (not if NHSBURS=yes)

Have you received, or do you expect to receive, any money as part of a course grant paid by the Student Loans Company (OU students: or Open University) for books, travel and other course costs this academic year? For more information, please click on the box below.

Yes
No

Information Box

Part-time students can apply for a Course Grant to help with living costs. This is paid directly into your bank account.

How much you get depends on your household income and circumstances. The amounts shown below can increase if you have a partner or children.

<table>
<thead>
<tr>
<th>Household income - single student without children</th>
<th>Course Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>up to £26,029</td>
<td>£265</td>
</tr>
<tr>
<td>£26,030-£28,065</td>
<td>£50-£265</td>
</tr>
<tr>
<td>over £28,065</td>
<td>no grant</td>
</tr>
</tbody>
</table>

Welsh students earning less than £26,095 are eligible to receive a full course grant of £1,125. Course grants of between £50 and £1,124 are available for Welsh students earning between £26,096 and £28,180.

{Ask if CRSG=Yes}

"How much Course Grant have you received or do you expect to receive over this academic year that is between DATE and DATE? If you are not sure of the exact amount, please give your best estimate.

1. 1000
1.12.7 Scholarship and bursaries from college/university – ask all

{Ask all – English}
SCHOLE
Have you received, or do you expect to receive, a scholarship or bursary from your college or university this academic year? Please don’t include any contributions towards the cost of fees that you have already told us about.
Yes
No

{Ask all – Welsh}
SCHOLW
Have you received, or do you expect to receive, a scholarship or bursary from your college or university this academic year. Please include any money received from the Welsh Bursary Scheme? Please don’t include any contributions towards the cost of fees that you have already told us about.
Yes
No

{Ask if SCHOLE=Yes}
UCSCOL1E
How much money have you received or do you expect to receive from your college or university as part of a scholarship or bursary in this academic year? Please do include any contributions to living costs, but do not include any contributions towards the cost of fees that you have already told us about. You can answer for the whole academic year or per term, how would you prefer to answer?
- Academic year
- Per term

UCSCOLAME
How much have you received? 1.. 3000

UCSCOL1W
How much money have you received or do you expect to receive from your college or university as part of a scholarship or bursary in this academic year, please include any money received from the Welsh Bursary Scheme? Please do include any contributions to living costs, but do not include any contributions towards the cost of fees that you have already told us about. You can answer for the whole academic year or per term, how would you prefer to answer?
- Academic year
- Per term

UCSCOLAMW
How much have you received? 1.. 3000
1.12.8 Childcare Grant – full time only (not if NHSBURS=yes) INCLUDE WELSH PART TIME HERE TOO (UKDOM=WALES, FTPT=PART TIME)

{Ask if FTPT=yes and CHILDHH=yes.}
CHGR
Have you received, or do you expect to receive any money as a Childcare Grant this academic year? For more information, please click on the blue icon.
Yes
No

Information box

You can apply for a Childcare Grant if you are a full-time undergraduate student and you:
• have at least one dependent child who is under 15 and in registered or approved childcare; or
• have at least one dependent child who is under 17, is registered as having special educational needs, and in registered or approved childcare.

Depending on your household income, you can apply 85% of your actual childcare costs during term times and holidays. You can get up to £148.75 a week for one child or up to £255 a week for more than one child.

{Ask if CHGR=yes}
CHCP1
How much Childcare Grant do you expect to receive over the academic year.
Do you want to give the amount by:
• Academic year
• Per term
• Per month
• Per week

CHC2
How much will you receive? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 13,260

{Ask those who have given CHCP1 amounts weekly or monthly}
CHCP2
How many (weeks/months) do you receive this per year?
Numeric answer: range 1 to 52
1.12.9 Parental Learning Allowance – full time only (not if NHSBURS=yes)
INCLUDE WELSH PART TIME HERE TOO (UKDOM=WALES, FTPT=PART TIME)

{ Ask if FTPT=yes and CHILDHH=yes}
PLA
Have you received, or do you expect to receive any money as part of the Parents’ Learning Allowance this academic year? For more information, please click on the blue icon.
Yes
No

Information box

The Parents’ Learning Allowance helps with course-related costs if you have dependent children. The amount you can get depends on your income and the income of your husband, wife or partner (if you have one) and any dependants. You can get up to £1,508 a year.

{Ask if PLA=yes}
PLAP1
How much Parents’ Learning Allowance have you received or do you expect to receive over the academic year? Do you want to give the amount by:

- Academic year
- Per term

PLAP2
How much will you receive?
If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 1508

1.12.10 Adult Dependant’s Grant – full time only (not if NHSBURS=yes)
INCLUDE WELSH PART TIME HERE TOO (UKDOM=WALES, FTPT=PART TIME)

{ Ask if FTPT=yes and DEPAD=yes}
ADG
Have you received, or do you expect to receive any money as part of an Adult Dependants’ Grant this academic year? For more information, please click on the box below.
Yes
No

Information box
You can apply for the Adult Dependants’ Grant if you are a full-time undergraduate student or a full-time postgraduate ITT student and you have an adult who depends on you financially.

The amount you can get depends on your income and the income of your dependants (including your husband, wife or partner). You can get up to £2,642 a year.

{Ask if ADG=yes}

ADGP1
How much Adult Dependants’ Grant have you received or do you expect to receive over the academic year?

You can answer for the whole academic year or per term, how would you prefer to give your answer?
- Academic year
- Per term

ADGP2
How much will you receive? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 2642

1.12.11 Disability Students’ Allowance – ask all (include if NHSBURS=yes)

{Ask all}

DSA1
Have you received or do you expect to receive any Disabled Students’ Allowance this academic year? For more information, please click on the blue icon.
Yes
No

Information box

DSAs are grants to help meet the extra course costs students face because of a disability. For example, DSAs can help pay for:
- specialist equipment you need for studying like computer software
- non-medical helpers, such as a note-taker or reader
- extra travel costs you have to pay because of your disability
- other costs such as photocopying or printer cartridges
The amount you get depends on your specific needs, not your household income. The figures in the table are the maximum amounts available. Any money for equipment and support is paid directly to the supplier. If you claim back money for any additional expenses, this is paid directly into your account.

<table>
<thead>
<tr>
<th>Type of student</th>
<th>Specialist equipment</th>
<th>Non-medical helper</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time</td>
<td>up to £5,161 for whole course</td>
<td>up to £20,520 a year</td>
<td>up to £1,724 a year</td>
</tr>
<tr>
<td>Part-time</td>
<td>up to £5,161 for whole course</td>
<td>up to £15,390 a year</td>
<td>up to £1,293 a year</td>
</tr>
</tbody>
</table>

{Ask if DSA1=yes}

DSA2
Thinking about the Disabled Students’ Allowance, which of the following allowances have you received or do you expect to receive? Please tick all that apply.
- A general disabled students’ allowance
- Specialist equipment allowance
- A non-medical helpers’ allowance
- Extra travel costs
- Other
- Don’t know

{Ask if DSA2=Other}

DSA2ot
How much (other) Disabled Student Allowance will you receive this academic year?

{Ask students who have received or expect to receive a DSA specialist equipment allowance – see DSA2 for routing}

EQUIP1
How much will you receive for specialist equipment as part of disabled students’ allowances in this academic year? Please give your best estimate if you are unsure.
Numeric answer: range 1 to £5,161

{Ask students who have received or expect to receive a DSA non-medical helper’s allowance – see DSA2 for routing}

HELP1
How much will you receive as the non-medical helper’s allowance part of disabled students’ allowances in this academic year? Please give your best estimate if you are unsure.
{Ask students who have received or expect to receive a DSA general allowance— see DSA2 for routing }

**GENP1**

How much will you receive as the general allowance part of disabled students' allowances in this academic year? *This allowance could cover things like internet connections, ink cartridges and paper and photocopying. This may be paid directly to a supplier or provider rather than to you, but we are interested in how much is paid on your behalf in total. If you are not sure of the exact amount, please give your best estimate.*

Numeric answer: range 1 to £20,520

{Ask students who have received or expect to receive DSA extra travel costs— see DSA2 for routing }

**DTRP1**

How much will you receive to cover extra travel costs you have to pay as a result of your disability in this academic year? *This may be paid directly to a supplier or provider than to you, but we are interested in how much you is paid on your behalf in total. If you are not sure of the exact amount, please give your best estimate.*

**CODE THE AMOUNT**

Numeric answer: range 1…10000

**1.12.12 Teacher Training England – full time and part time**

{Ask if UKDOMP=England and QUAL= 'PGCE/ITT'}

**EITT**

Have you received, or do you expect to receive, any money through a *Training Bursary related to your teacher training course* this academic year? *For more information, please click on the blue icon.*

Yes

No

---

**Information box**

In 2011/12, Training Bursaries of £6,000 or £9,000 were available for teacher training relating to some subjects, including Maths, science and Modern Languages.

{Ask if EITT=yes }

**EITTP1**
How much Training Bursary have you received or do you expect to receive in this academic year? You can answer for the whole academic year, per term or per month, how would you like to give your answer?

- Academic year
- Per term
- Per month

ETT2
How much will you receive?
Numeric answer: range 1 to 9000

1.12.13  Teacher Training Wales – full time and part time

{Ask if UKDOMP=Wales and QUAL= ‘PGCE/ITT’}

WITT
(Have you received, or do you expect to receive) any money from any of the following sources relating to your teacher training course this academic year? *Please tick all that apply. For more information, please click on the blue icon.*

A Course Grant for ITT students
The Teacher Training Recruitment Scheme in Wales
The Welsh Medium Supplement in Wales
The Teaching Grant in Wales

**Information box**

Subject to eligibility, training grants for postgraduate ITT courses in Wales starting between 1 September 2011 and 31 August 2012 are as follows:

(i) £9,000 for eligible students studying wholly or mainly one or more of the subjects of mathematics, physics, chemistry or Welsh at secondary level;

(ii) £6,000 for eligible students studying wholly or mainly one or more of the subjects of modern foreign languages, biology or general/combined science at secondary level.

Training grants for postgraduate ITT courses in Wales starting between September 2010 and August 2011 are as follows:-

i. £9,000 for eligible students studying wholly or mainly at secondary level one or more of the subjects of mathematics, physics, chemistry, information and communications technology (ICT), design & technology or Welsh;

ii. £6,000 for eligible students studying wholly or mainly at secondary level one or more of the subjects of music, religious education, modern foreign languages, English, geography, biology or general/combined science courses;
iii. £4,000 for eligible students studying wholly or mainly any subject at secondary level other than those listed above, and for eligible students on primary postgraduate courses.

For the subjects of mathematics, physics and chemistry, a £5,000 teaching grant may be payable; and for the subjects of ICT, design & technology and Welsh, a £2,500 teaching grant may be payable.

{Routed from WITT}

WITTP1
How much have you received or do you expect to receive from the Course Grant for ITT Students in this academic year? You can answer for the whole academic year, per term or per month, how would you like to give your answer?
- Academic year
- Per term
- Per month

WITTP1b
How much will you receive?
Numeric answer: range 1 to 9000

{Routed from WITT}

WITTP2
How much have you received or do you expect to receive from the Teacher Training Recruitment Scheme in Wales in this academic year? You can answer for the whole academic year, per term or per month, how would you like to give your answer?
- Academic year
- Per term
- Per month

WITTP2b
How much will you receive?
Numeric answer: range 1 to 9000

{Routed from WITT}

WITTP3
How much have you received or do you expect to receive from the Welsh Medium Supplement in this academic year? You can answer for the whole academic year, per term or per month, how would you like to give your answer?
- Academic year
- Per term
- Per month
WITTP3b
How much will you receive?
Numeric answer: range 1 to 9000

{Routed from WITT}
WITTP4
How much have you received or do you expect to receive from the Teaching Grant in Wales in this academic year? You can answer for the whole academic year, per term or per month, how would you like to give your answer?
- Academic year
- Per term
- Per month

WITTP4b
How much will you receive?
Numeric answer: range 1 to 9000

1.12.14 Access to Learning – England full time and part time (include if NHSBURNS=yes)

{Ask all studying in England.}
ACC
Have you received, or do you expect to receive any money from your college or university through Access to Learning Funds? For more information, please click on the blue icon.
Yes
No

Information Box

The Access to Learning Fund can provide extra help if you're in hardship and need extra financial support. You may, for example, be able to get help:

- for course or living costs that are not already covered by other forms of financial help - these could be everyday living costs, childcare costs or support over the summer vacation if you have no one else to turn to
- for emergency payments to cover unexpected financial crises or exceptional costs - such as repairs to essential household equipment
- if you are thinking of giving up your course because of financial problems and need extra support to help you keep studying

The Access to Learning Fund is available to:
- full-time higher education students
- full-time postgraduate students
Part-time undergraduate and postgraduate students can also qualify, as long as their course:
- lasts at least one year, and
- takes no more than twice as long to complete as an equivalent full-time course

{Routing from ACC and NHSOTH1}
ACC1
How much money have you received, or do you expect to receive, from the Access to Learning Fund this academic year? *If you are not sure of the exact amount, please give your best estimate.*
Numeric answer: range 0 to 4000

{Routing from ACC and NHSOTH1}
ACC3
Do you eventually have to pay this money back or is it a grant that you can keep?
Need to pay money back
Can keep money

1.12.15 Access to Learning – Wales full time and part time (include if NHSBURS=yes))

{Ask all studying in Wales.}
CFC
(Have you received, or do you expect to receive) any money from your college or university through the Financial Contingency Funds scheme or FCF scheme? *(IF OU: As an OU student you may know this form of support as the Access to Learning Fund in Wales).* For more information, please click on the blue icon.
Yes
No

Information Box

The Welsh Government provides funding to universities and colleges, so that they have give extra help if you’re in hardship and need extra financial support. You may, for example, be able to get help:
- for course or living costs that are not already covered by other forms of financial help - these could be everyday living costs, childcare costs or support over the summer vacation if you have no one else to turn to
- for emergency payments to cover unexpected financial crises or exceptional
costs - such as repairs to essential household equipment

- if you are thinking of giving up your course because of financial problems and need extra support to help you keep studying

The Financial Contingency Fund is available to:
- full-time higher education students
- full-time postgraduate students

Part-time undergraduate and postgraduate students can also qualify, as long as their course:
- lasts at least one year, and
- takes no more than twice as long to complete as an equivalent full-time course

Part-time undergraduate and postgraduate students can also qualify, as long as their course:
- lasts at least one year, and
- takes no more than twice as long to complete as an equivalent full-time course

{Routing from CFC and NHSOTH1}
WACC1
How much money have you received, or do you expect to receive, from the Financial Contingency Funds scheme this academic year {IF OU: As an OU student you may know this form of support as the Access to Learning Fund in Wales}? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to XXXX

{Routing from CFC and NHSOTH1}
WACC3
Do you eventually have to pay this money back or is it a grant that you can keep?
Need to pay money back
Can keep money

1.12.16 Socrates-Erasmus exchange programme – full time and part time (include if NHSBURNS=yes)

{ Ask all, except OU students}
ERAS
Have you received, or do you expect to receive, any money as part of the Socrates-Erasmus exchange programme this academic year? For more information, please click on the blue icon.
Yes
Information Box

Erasmus is the European Commission's exchange programme that enables students in 33 European countries to study, work or teach for part of their degree in another country.

The Erasmus programme is open to undergraduates and postgraduates. Erasmus is open to the majority of disciplines, but opportunities will depend on the agreements your institution has made and what degree programme you are on.

1.12.17 Extra travel costs related to the course

{Ask if FTPT=fulltime and Subject2=medical/dentistry or ABROAD2=yes}

TRAV

Have you received, or do you expect to receive, any money towards extra travel costs as a result of your course this academic year? For more information, please click on the blue icon.

Yes
No

Information Box

A Travel Grant is a grant available to full time students who are attending a Clinical Placement in the UK or Studying Abroad as part of their course.

You can apply for a travel grant if you are studying a full-time higher education course and you are receiving student finance that depends on your household income, e.g. Maintenance Loan or Maintenance Grant.

You must also be:

- attending an overseas institution for at least 50% of any academic term. This period of study can be compulsory or optional. If you are on a work placement abroad you will not be eligible for a Travel Grant

or

- attending a hospital or other premises in the UK as an integral part of your medical or dental course. You won’t get Travel Grant if you are eligible to apply for means-tested bursaries or awards from the Department of Health. This does not cover any attendance involving residential study
The amount of Travel Grant you can get depends on your household income and covers reasonable costs incurred on travel expenses during an academic year. The first £303 of travel costs are disregarded. So you can get your costs less £303.

{ Ask if TRAV=yes}

TRAVP1
How much money for extra travel costs have you received or do you expect to receive in this academic year. (Add if ABROAD1= YES We will ask about Socrates-Erasmus funding later on, so please do not include any money you have received through this here?) You can answer for the whole academic year, per term, per month or per week, how would you like to give your answer?
- Academic year
- Per term
- Per month
- Per week

TRAV2
How much will you receive? If you are not sure of the exact amount, please give your best estimate.

{ All those who have given amounts weekly or monthly at TRAVP1}

TRAVP2
How many (weeks/months) do you receive this per year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 52

{Ask if ERAS=yes}

ERASAM
How much have you received or do you expect to receive for Socrates-Erasmus funding in total over the academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 10000

1.12.18 Other

{ Ask all. }

OTHFUND
And have you received, or do you expect to receive, any money from any other grants, awards or scholarships no matter how small the amount? This could include, for example, any money from an educational trust or charity.
Yes
No

{See OTHFUND and NHSOTH for routing}

OTHAM
How much money have you received or do you expect to receive in this academic year from these other grants or allowances that have not already been mentioned? Do not record amounts received from family or friends. If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 10000
1.13 Student’s choices and student support

1.13.1 Student support and decisions about studying

{Ask all}
DEC
Did the student funding and support available to you affect your decisions about study in any way?
Yes
No

{Ask if DEC=yes}
DECWH
In what ways did the support available affect your decisions about studying? Please tick all that apply.
It affected my decision to study full-time or part-time
It affected my decision of whether to study at a nearby university so I could live with my family rather than going to a different university where I would have to live independently
It affected my decision to study in England or Wales (only students studying in England)
It affected my decision to study in London or not
It affected my decision about what course to take
It affected my decision about what institution to attend
It affected my decision to study in another way
I would not have studied without funding
None of these

{Ask if DECWH=It affected my decision in another way}
In what way did the support available affect your decisions about studying? Please describe.

{Ask all}
OLDLOAN
At the start of this academic year, did you have any loans outstanding from the Student Loans Company - this could have been loans for fees or maintenance, but please do not include any loans taken out but paid back before the start of the academic year.
Yes
No

{Ask if OLDLOAN=yes}
OldLAm1
How much had you borrowed in total from the Student Loans Company before the start of this academic year that is DATE?
0..30000
{Ask if OLDLAM1>0})
OldLAm2
How much, if any, had you paid back of this amount before the start of this academic year that is DATE
0..3000

Other Income

1.14 Earnings

{All}
CASH
I’d now like to ask you about any earnings from paid work. This includes any money from a full or part-time job and money you may have earned however casually or occasionally. Have you received any earnings from paid work since the start of the academic year, that is since DATE?
Yes
No

{ASK if CASH=yes}
WRK
How many jobs or different types of paid work have you earned from in the academic year, that is since DATE (IF NOT OU: please include jobs in term-time and vacations)? Please enter casual work as one entry (e.g. enter babysitting as one type of work, rather than splitting out into 3 babysitting jobs if you sit for 3 families).
Numeric; range 0 to 8

{Repeat until each job has been entered}
PTJDET
{IF WRK=1} Please describe the type of job you do? – e.g. bar work, cashier in shop etc.
{IF WRK>2} Thinking of the jobs you have earned from in this academic year, please describe the first/ second/ third job you do/ have done – e.g. bar work, cashier in shop etc.
String answer

{Repeat for each job/employment student has}
JSTDAT
When did you start this (NAME OF WORK) work? If you cant remember the exact date, please enter your best guess.
Datatype answer

{Repeat for each job/employment student has}
Do you expect this (NAME OF WORK) work to carry on at least until the end of the academic year, that is DATE?
Yes
No

When did the employment end or when do you expect this (NAME OF WORK) work to end? If you are not sure of the exact date, please give your best estimate.
Datetype answer

Do you work the same number of hours in term time and vacations or a different number of hours - please think about the Easter and Christmas vacations only as we will ask about the summer vacation separately?
Same
Different

For approximately how many hours do you do this job each week (IF DOES A DIFFERENT AMOUNT OF HOURS IN TERM VS VACATIONS: in term time)? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 70

For approximately how many hours do you do this job each week in vacations? This means Christmas and Easter holidays – we will ask about summer holidays separately. If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 70

How much do you earn from this job (IF DOES A DIFFERENT AMOUNT OF HOURS IN TERM VS VACATIONS in term-time) after all deductions including tax, national insurance and so on. You can tell me the amount per week or per calendar month?

You can tell us the amount per week, per calendar month or per year.
• Week
• Month
• Year

JOBPT
Enter amount earned. If you are not sure of the exact amount, please give your best estimate.

{All who work different hours in vacations }

JOBAMV
How much do you earn from this job in holidays after all deductions including tax, national insurance and so on. You can tell me the amount per week, per calendar month or per vacation?
You can tell us the amount per week, per calendar month or per year.
• Week
• Month
• Year

JOBPV
Enter amount earned. If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 200000

1.14.1 Summer 2011 vacation work

{Ask all students except OU students}

VACS
Did you do any paid work over last summer vacation, that is between DATE and DATE?
Yes
No

{Ask students in second year and above, except OU students, who worked in the summer vacation}

VACSWK
For approximately how many weeks did you work? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 25

{Ask students in second year and above, except OU students, who worked in the summer vacation}
VACSHRP
And for how many hours did you work? You can give your the amount for the entire vacation, per calendar month or per week. How would you like to give your answer?
Do you want to give the amount by:
• Per week
• Per calendar month
• Entire vacation

VACSHb
How many hours did you work? If you are not sure of the exact amount, please give your best estimate.

VACSPER
How much did you earn from this work after all deductions including tax, national insurance and so on, but including any tips you may receive. You can give your the amount for the entire vacation, per calendar month or per week. How would you like to give your answer?
• Per week
• Per calendar month
• Entire vacation

VACSPERb
"How much did you earn? If you are not sure of the exact amount, please give your best estimate. 1..15000

1.14.2 Earnings in the rest of the academic year

{Ask all}
JOBFUT
Excluding all of the jobs you have already told me about, do you expect to have any other paid jobs between now and the end of the academic year, that is DATE, including term times and vacations?
Yes
No

{If expect to have more jobs}
JOBFUTAM
How much do you expect to earn from these other jobs between now and the end of the academic year, thinking about both term time and vacations - please tell me after all deductions including tax, national insurance and so on? You can give your answer per week, per calendar month or per academic year. How would you like to give your answer?
• Per week
• Per calendar month
• Academic year
JOBFUTAb
How much do you expect to earn? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 10000

{Only if in paid employment and DTFWHO or CRSOTH or CRSOU=my employer}
EMPSUP1
Has your employer given you any extra financial support this academic year to help with the cost of your studies – please include the value of any gifts in kind received (e.g. such as books or computer equipment)? Please do not tell us about any financial support you have already mentioned (e.g. money for tuition fees).

{Only if in paid employment and DTFWHO or CRSOTH or CRSOU=my employer}
EMPSUP2
How much extra financial support has your employer given you this academic year? If you are not sure, please give your best estimate. If you have not received anything, please enter 0.
Numeric answer: range 0 to 10000

1.15 Benefits

{Ask all}
BEN1
Do you currently receive any of these benefits or allowances in your own right (IF MARRIED/LIVING WITH PARTNER or in your partner’s name)?

Child Benefit (Only if have children)
Child Tax Credit (Only if have children)
Retirement Pension or Widow’s pension (Only if aged over 60)
Pension Credit (Only if aged over 60)
Carer’s Allowance (previously Invalid Care Allowance)
Employment & Support Allowance
Any disability/invalidity/incapacity/sickness benefit
Working Tax Credit
Job Seeker’s Allowance (JSA) / Other unemployment benefits
Income Support
Housing Benefit
Local Housing Allowance
Other state benefits (specify)
None of these
{Ask all who said “other” benefits}
BEN2
WRITE IN BENEFIT
Open answer

{Ask all receiving a benefit. Repeat for each benefit}
BENAM
How much (BENEFIT) do you receive each week (FOR INCOME SUPPORT excluding
mortgage interest payments)? *If you are not sure of the exact amount, please give your
best estimate.*
Numeric answer: range 0 to 8000

1.16 Spouse’s income/benefits

{Ask students who are married or live with a partner}
PARACT
How would you describe your spouse’s/partner’s *main* activity?
Paid employment
Self-employment
Unemployed and seeking work
Full-time education
On a government scheme for employment training
Voluntary work
Temporarily sick/disabled
Permanently sick/disabled
Looking after home/family
Wholly retired
Other

{Ask students who are married or live with a partner}
PARAMa
What is your spouse's/partner's total income - by income we mean income from all
sources, including earnings from employment, pensions, gifts of money, benefits in his/her
name and so on. But, please don’t include any benefits that are shared that you have
already mentioned. You can give his/her income either gross, that is before tax and
deductions, or net, that is after deductions for tax and national insurance. And you can
also give his/her income per week, per month or their annual income?
Firstly, would you rather give his/her income as gross or net?
- Gross
- Net

PARAMb
Would you rather give his/her income per week, per month or their annual income?
How much is his/her total income?
If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 200000

{Ask students who are married or live with a partner who HAVEN'T given a figure for partners’ income}

Could you say into which of these bands your spouse’s/partner’s total annual income falls - you can give the amount either gross, that is before tax and deductions, or net, that is after tax and deductions? If you are not sure of the exact amount, please give your best estimate.

A. up to £5,000
B. £5,001 to £10,000
C. £10,001 to £15,000
D. £15,001 to £20,000
E. £20,001 to £25,000
F. £25,001 to £30,000
G. £30,001 to £40,000
H. £40,001 to £50,000
I. £50,001 or more

{Ask students who are married or live with a partner who have given a banded figure for partners’ income}

SPECIFY GROSS OR NET
Gross
Net

1.17 Maintenance

CHABS2=yes OR if PARTCH2=yes OR if MARITAL=divorced or separated.
If married or living with partner (at MARITAL), the text fill "or your partner" should appear.
If CHABS2=yes OR if PARTCH2=yes, the text fill "and/or children" should appear.

MAINT1
Do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your partner) make any regular payments for maintenance for a former partner (TEXFILL and/or children) who are not living with you?
Yes
No

{Ask if student or student’s partner makes maintenance payments}

MAINT2

What is the amount that you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your partner) pay - you can tell us weekly, monthly or over a year?

<table>
<thead>
<tr>
<th>Do you want to give the amount by:</th>
<th>Please enter the amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Per month</td>
<td>Numeric answer: range 1 to 50000</td>
</tr>
<tr>
<td>• Per year</td>
<td></td>
</tr>
</tbody>
</table>

1.18 Money and gifts

{To all}

MonGif

Now we would like to ask you about any money or gifts which you receive from your parents or other relatives. Please do not mention money that you have already told me about (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and do not include any money given to you by your spouse/partner)?

{Ask all}

PARENTS1

During this academic year, how much money have you received or do you expect to receive from your parents (or other relatives) to pay for your living costs and bills?

Please remember to include money received for:

• Rent or mortgage
• Bills (including electricity, gas, phone)
• Food
• Going out/ entertainment
• Mobile phone costs
• Travel costs (including car insurance, petrol)
• Insurance costs

If you are not sure, please give your best estimate. If you have not received anything, please enter 0. Please do not include any money towards tuition fees that you have already told us about.

Numeric answer: range 0 to 10000

PARENTS2:
Excluding anything you have already told me about, during this academic year, how much money have you received or do you expect to receive from your parents (or other relatives) to pay for anything else?

Please remember to include:
- Money received for Christmas and your birthday
- Money to buy items relating to your course (such as laptops, books and other equipment)
- Money to buy anything else (such as clothes, household goods and furniture, electronic equipment etc.)

*If you are not sure, please give your best estimate. If you have not received anything, please enter 0. Please do not include any money towards tuition fees that you have already told us about.*

Numeric answer: range 0 to 10000

PARENTS3:
What is the value of any gifts you have received or expect to receive from your parents (or other relatives) this academic year?

Please include:
- Gifts received for Christmas and your birthday
- Gifts relating to your course (such as laptops, books and other equipment)
- Any other gifts (such as items relating to transport/travel, electronic equipment, CDs and DVDs, mobile phones, household goods, clothes, food etc.)

*If you are not sure, please give your best estimate. If you have not received anything, please enter 0.*

Numeric answer: range 0 to 10000

**1.19 Savings**

{Ask all}

We would now like to find out about your savings. At the beginning of this academic year, what was the total level of your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner’s) savings, if any? This might be kept in a savings account in a bank, in a building society account, in ISAs, or be money in your current account that you do not intend to spend. *If you are not sure of the exact amount, please give your best estimate.*

Numeric answer: range 0 to 80000
{Ask all}  
SAVEE  
By the end of this academic year, what do you expect your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner’s) total level of savings will be? *If you are not sure of the exact amount, please give your best estimate.*  
Numeric answer: range 0 to 80000

### 1.20 Miscellaneous income

#### 1.20.1 Maintenance payments

{Ask students with children (either living with or not with the student).}  
MAINT  
The next set of questions are about maintenance payments. Are you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) currently receiving any maintenance payments from a former spouse or partner, either as support for you personally or for your children? *Please include any informal payments.*  
Yes  
No

{Ask if student or partner/spouse receives maintenance payments}  
MAINT2X  
How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) do you expect to receive this academic year? *If you are not sure of the exact amount, please give your best estimate.*  
Numeric answer: range 0 to 3000  
(Answers allowed per week/ month/ year)

#### 1.20.2 Other

{Ask all}  
GITFOTH  
During this academic year, how much money have you received or do you expect to receive from *any other sources, such as from your friends, from pensions or shares* – please include the value of any gifts received? *If you are not sure, please give your best estimate. If you have not received anything, please enter 0.*

#### 1.20.3 Sale of books etc.

{Ask all}  
SELLBK
So far this academic year, how much money have you made by selling possessions such as books, computer equipment and other items? If you are not sure, please give your best estimate. If you have not sold anything, please enter 0.
1.21 Commercial credit/overdraft

1.21.1 Overdrafts

{Ask all}

ODB
At the beginning of this academic year, by how much, if at all, were you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) overdrawn on a bank or building society account? If you are not sure of the exact amount, please give your best estimate. If no overdraft, enter zero.
Numeric answer: range 0 to 30000

{Ask all}

ODE
By how much, if at all, do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) expect to be overdrawn in total at the end of the academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 30000

1.21.2 Commercial loans

{Ask all}

COM
Do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) have any outstanding loans, for example from banks or other financial institutions, for which you are making repayments. Please include any loans taken out to purchase large items, such as a car or television. But please exclude any bank overdrafts, mortgages and any loans from the Student Loans Company or any Career Development Loans?
Yes
No

{Repeat for each commercial loan student has}

COMDT
How much will you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) still owe on this loan, after you have paid these repayments at the end of this academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 50000

How much money do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) expect to pay in repayments this academic year? If you are not sure of the exact amount, please give your best estimate.
1.21.3 Credit/store cards

{Ask all year}
CCACSAM
How much, if anything, did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) have outstanding on credit and store cards at the start of this academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 50000

{Ask all}
CCENDAM
How much, if anything, do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) expect to have outstanding on credit and store cards at the end of this academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 50000

{Ask all}
ARRF
At the end of the academic year do you think that you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) will be behind on 2 or more payments for any of the following items? Please tick all that apply.
Rent, mortgage repayments or council tax
Gas, electricity or water
Credit Card payments
Mail order catalogue payments
Telephone or TV licence
Childcare payments, child support or maintenance
Road Tax
Other items
None of these

{Ask once if in arrears for any of the above}
ARRFAM
So how much in total do you think you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) will be in arrears with these bills in total by the end of June 2012? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 20000

1.22 Expenditure
1.22.1 Housing costs

1.22.2 General

{Ask all}

HOUS3
Which of the following best describes where you live?
Alone in rented house/flat/lodgings
Alone in a flat/house you are buying or own
With parents/step-parents or spouse’s parents
In a house/flat owned by your parents/step-parents (but not living with them)
With a spouse/partner/relatives or children in a flat/house I/we are buying or own
With a spouse/partner/relatives or children in a flat/house I/we rent
With friends/students in a rented house/flat/lodgings (not provided by your University/college)
University/College provided accommodation e.g. halls of residence/student flat/hostel
Other (specify)

{Ask all}

HOUS3SP
WRITE IN TYPE OF ACCOMMODATION
Open question

{Ask all who are buying or own their own house, either alone or with spouse/children}

HOUS4
Are you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) buying this property on a mortgage at the moment, or do you own this property outright?
Making repayments
Own outright

{Ask if student is paying mortgage currently}

HOUS5
What are your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse’s/partner’s) monthly mortgage repayments on this property, including any endowment policies, interest payments or insurance policies related to the mortgage or property. (IF RECEIVES INCOME SUPPORT OR JSA AT BEN1: Please exclude any money you receive from the ‘Income Support Mortgage Interest’ scheme, if relevant)? If you are not sure of the exact amount, please give your best estimate. (IF RECEIVES INCOME SUPPORT OR JSA AT BEN1: If you receive any help from the ‘Income Support Mortgage Interest’ scheme, please exclude this from the total.)
Numeric answer: range 1 to 10000

{Ask all who are buying or own their own house, either alone or with spouse/children and who live in a household containing more than 1 person}
HOUS6
And do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) get any rent from lodgers or sharers?
Yes
No

{ Ask all who receive rent from lodgers/sharers }
HOUS7
How much rent do you receive per month? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 5000

{All who are renting their accommodation}
HOUS8
How much does your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse’s/partner’s) rent currently cost per month - this should include the total rent charged to you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse/partner), even if you receive contributions towards this from (IF RECEIVES HOUSING BENEFIT AT BEN1: Housing Benefits or other sources) others?
Numeric answer: range 0 to 10000

{All who are renting their accommodation}
HOUS10
Do you pay the same amount of rent during term time as you do during the Christmas and Easter holidays?
Yes – same amount
No – different amount

{If HOUS10=No}
HOUS11
How much does your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse’s/partner’s) rent cost per month during the Christmas and Easter holidays - this should include the total rent charged to you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse/partner), even if you receive contributions towards this from others? If you pay different amounts in the Easter and Christmas holidays, please give the higher amount.
Numeric answer: range 0 to 10000

1.22.3 Last summer vacation
HOUSp

Last summer vacation, that is between DATE and DATE, did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) have to pay a retainer for any accommodation you were not actually living in?
Yes
No

HOUSq

How much did this cost. Please tell me the actual cost for your share of the retainer, even if someone else helped you pay for your share. You can tell me per week, per calendar month or for the whole vacation? If you are not sure of the exact amount, please give your best estimate.

Do you want to give the amount by:
- Per week
- Whole vacation

Please enter the amount
Numeric answer: range 1 to 10,000

1.22.4 Council Tax

CT1a

Have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) paid or do you expect to pay any council tax during the course of the academic year, that is since October 2011 - please do not include payments made covering time before the start of the academic year or payments included in your rent which you have already talked about?
Yes
No

CTAM

How much did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) pay towards council tax last month? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 3000

1.22.5 Household expenditure/bills

REMEMBER THAT FOR MARRIED COUPLES OR THOSE LIVING TOGETHER THE INFORMATION IS REQUIRED FOR THE HOUSEHOLD
{Ask all}
ELEC
How much did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) pay for your last electricity bill? If you share this bill with others, please include the share you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your spouse/partner) are responsible for. If you are not sure of the exact amount, please give your best estimate. Please include payments for packages combining gas/electricity. If electricity is included in your rent, which you have already told us about, please enter 0.
Numeric answer: Range 0 to 1000

{Ask all}
GAS
Excluding any money you have just mentioned, how much did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) pay for your last gas bill? If you share this bill with others, please include the share you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your spouse/partner) are responsible for. If you are not sure of the exact amount, please give your best estimate. If gas is included in your rent, which you have already told us about, please enter 0.
Numeric answer: Range 0 to 1000

{Ask all}
WAT
How much did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) pay for your last water bill? If you share this bill with others, please include the share you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your spouse/partner) are responsible for. If you are not sure of the exact amount, please give your best estimate. If water is included in your rent, which you have already told us about, please enter 0.
Numeric answer: Range 0 to 1000

Other fuel

1.22.6 Telephones/mobile phones

{Ask those with mobile phones}
MOBC
How much did you spend last month on topping up your mobile or on your mobile phone contract? *If you are not sure of the exact amount, please give your best estimate.*

Numeric answer: Range 0 to 1000

**TELC**
How much, if anything, did you personally pay last month for a landline telephone, broadband or Wi-Fi connection and any television packages (such as Sky-Plus or Virgin Media)? *If you are not sure of the exact amount, please give your best estimate. If your parents pay for these charges, please enter 0.*

Numeric answer: Range 0 to 1000

**TVLIC**
How much, if anything, did you personally pay last month for a television licence? *If you are not sure of the exact amount, please give your best estimate. If your parents pay for these charges, please enter 0.*

Numeric answer: Range 0 to 1000

### 1.22.7 Travel

*{NB IF STUDENTS MARRIED/COHABITING DO NOT ASK ABOUT SPOUSE’S OR PARTNER’S EXPENDITURE ON PUBLIC TRANSPORT}*

{*Ask all who live away from the family home/ don’t ask if aged over 25*}

**FAMPAM**
How much do you expect to spend this academic year on travel between your term-time accommodation and your parents’ or family home - please include the journeys you make at the start and end of each term, if you personally have to pay for these? *If you are not sure of the exact amount, please give your best estimate.*

Numeric answer: range 1 to 10000

{*Ask all*}

**TRCOST**
Roughly how much do you spend in the average week on public transport (including fares for buses or trains) – please include travel between where you live and college/university as well as any travel for leisure purposes?

Numeric answer: range 0 to 200

{*Ask all*}

**PETR**
Roughly how much do you spend in the average week on petrol costs and parking – please include travel between where you live and college/university as well as any travel for leisure purposes?

Numeric answer: range 0 to 200
VCOST
About how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner’s) spend on motor vehicle tax, insurance, repairs and maintenance over the year? *If you are not sure of the exact amount, please give your best estimate. If you do not own a motor vehicle, please enter 0.*
Numeric answer: range 0 to 10000

CH10
How much did you spend last week, or the last week your child(ren) were at school or nursery, on travel to and from school or nursery over and above any travel costs you have already told me about? *If you are not sure of the exact amount, please give your best estimate. By last week we mean the week ending yesterday.*
Numeric answer: range 0 to 500

TRIP5
How much do you expect to spend this academic year on any trips associated with your course work, such as study trips or residential school – please do not include any costs met by your college/university? *If you are not sure of the exact amount, please give your best estimate.*
Numeric answer: range 1 to 10000

HOLS1
Apart from the travel costs you’ve already told us about, how much have do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spent this academic year on holidays - please include the full cost of the holiday, not just the travel cost. *If you are not sure of the exact amount, please give your best estimate.*
Numeric answer: range 0 to 2000

1.23 Books and equipment

1.23.1 Books, workbooks, papers and pamphlets

BOOK1
(IF NOT-OU: This academic year, including immediately before your first term started,) (IF OU: since August 2011,) how much if anything do you expect to spend on new or second-hand books, workbooks, papers or pamphlets needed for your course work - please do not include photocopying or printing as these will be asked about separately? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 3000

1.23.2 Photocopying and stationery

{Ask all}
PHOT1
This academic year between DATE and DATE, how much to you expect to spend on photocopying, the use of a printer and stationery such as pens, disks and other items of computer equipment or software that you needed for your course work? You can answer this for the whole academic year, per term, per month or per week? If you are not sure of the exact amount, please give your best estimate.

Do you want to give the amount by:
- Per week
- Per month
- Per term
- Per year

PHOT2
Please enter the amount
Numeric answer: range 1 to 1000

1.23.3 Computers

{Ask all}
COMPe
During the current academic year that is between DATE and DATE have you personally bought, or do you expect to buy a computer (or any computer equipment) to use on course-related work? Please don’t include anything bought as a gift that you have already told us about.
Yes- already bought
Yes- expect to buy
No

{Ask if has bought a computer (COMPe)}
COMPf
And how much did you spend on the computer or computer equipment you have bought? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 10000

{Ask if student is going to buy a computer (COMPe)}
COMPg
And how much do you expect to spend on the computer you plan to buy? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 1 to 10000

1.23.4 Special equipment, clothing and materials

{Ask all}
EQUP
Is there any special equipment, clothing or materials that it is recommended you have for your course, that we haven’t already discussed - this can be equipment that you have or don’t have?
Yes
No

{Ask all who need special equipment etc}
EQUP1
(IF NOT-OU: This academic year, including immediately before your first term started,) (IF OU: since August 2011,) how much do you expect to spend on special equipment, clothing or materials needed for your course? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 10000

1.24 Child related expenditure

1.24.1 General
{Ask if CHILDHH=yes or PARTCH1=yes}
CH
Now we’d like to ask you what you spend on your child(ren).
Continue
{Ask if CHILDHH=yes or PARTCH1=yes}
CH1
How much did you spend last month, that is in the month ending yesterday, on your children’s toys and children’s books and presents? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 5000

{Ask if CHILDHH=yes or PARTCH1=yes}
CH2
How much do you spend on your children’s Christmas, other religious festivals and birthday presents over the academic year? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 5000

{Ask if CHILDHH=yes or PARTCH1=yes}
CH3
How much did you spend last month on your children’s clothes and shoes, excluding school uniforms? If you are not sure of the exact amount, please give your best estimate.
By last month we mean the month ending yesterday
Numeric answer: range 0 to 5000

{Ask if CHILDHH=yes or PARTCH1=yes} AND {CHAGE=5 to18 or PCHAGE=5 to 18}
CH4
And how much do you spend over the year on school uniforms? If you are not sure of the exact amount, please give your best estimate.
Numeric answer: range 0 to 5000

{Ask if CHILDHH=yes or PARTCH1=yes}
CH5
How much did you spend last month on your children’s entertainment and hobbies? If you are not sure of the exact amount, please give your best estimate. By last month we mean the month ending yesterday
Numeric answer: range 0 to 5000

{Ask if CHILDHH=yes or PARTCH1=yes} AND {CHAGE=0 to2 or PCHAGE=0 to 2}
CH6
How much did you spend last month on nappies and toiletries? If you are not sure of the exact amount, please give your best estimate. By last month we mean the month ending yesterday
Numeric answer: range 0 to 500

{Ask if CHILDHH=yes or PARTCH1=yes} AND {CHAGE=0 to2 or PCHAGE=0 to 2}
CH7
And how much do you spend over the year on baby equipment such as prams, pushchairs or car seats? *If you are not sure of the exact amount, please give your best estimate.*
Numeric answer: range 0 to 5000

{Ask if CHILDDH=yes or PARTCH1=yes} AND {CHAGE=4 to18 or PCHAGE=4 to 18}

How much did you give last month in pocket money or allowance? *If you are not sure of the exact amount, please give your best estimate. By last month we mean the month ending yesterday.*
Numeric answer: range 0 to 500

{Ask if CHILDDH=yes or PARTCH1=yes} AND {CHAGE=4 to18 or PCHAGE=4 to 18}

How much did you spend last week, or the last week your child(ren) were at school, on school lunches, packed lunches and school milk? *If you are not sure of the exact amount, please give your best estimate. By last week we mean the week ending yesterday.*
Numeric answer: range 0 to 500

{Ask if CHILDDH=yes or PARTCH1=yes} AND {CHAGE=4 to18 or PCHAGE=4 to 18}

How much do you spend over the year on school trips and outings? *If you are not sure of the exact amount, please give your best estimate.*
Numeric answer: range 0 to 500

{Ask if CHILDDH=yes or PARTCH1=yes} AND {CHAGE=4 to18 or PCHAGE=4 to 18}

How much do you spend over the year on tuition fees, school fees or a school fund? *If you are not sure of the exact amount, please give your best estimate.*
Numeric answer: range 0 to 5000

{Ask if CHABS=yes or PARTCH2=yes} AND {CHILDDH=no} AND {PARTCH1=no}

Excluding anything you have already told us about, this academic year, how much do you and your partner spend on your or your partner’s children who do not live with you?

Please include money spent on presents, entertainment, trips and outings, pocket money and school fees.
1.24.2 Childcare

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children}

CHC

We’d now like to ask you about childcare. Which of these types of childcare do you use? Please select all that apply

- Play school/nursery/ crèche/registered childminder
- Baby sitter/au pair/nanny
- After school care or after school clubs
- None of these - code if spontaneously mentioned

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used a play school/nursery/ crèche/registered childminder }

CHC1

How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) spent on play school/nursery/ crèche/registered childminder - you can tell me so far over the academic year, per month or per week? If you are not sure of the exact amount, please give your best estimate.

Do you want to give the amount by:
- Per week
- Per month
- Per year

CHC1B

How much have you spent?

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used baby sitter/au pair/nanny }

CHC2

How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) spent on baby sitters au pairs or nannies - you can tell me so far over the academic year, per month or per week? If you are not sure of the exact amount, please give your best estimate.

Do you want to give the amount by:
- Per week
- Per month
- Per year

CHC2B
How much have you spent?

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used after school care or after school clubs } 

CHC3
How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) spent on after school care or after school clubs - you can tell me so far over the academic year, per month or per week? If you are not sure of the exact amount, please give your best estimate.

Do you want to give the amount by:
- Per week
- Per month
- Per year

CHC3B
How much have you spent?

1.25 Other expenditure
{Ask all}

SPEN1
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER; or your spouse/partner) expect to spend in total on items relating to transport or travel, such as a bicycle or motor vehicle? If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}

SPEN2
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER; or your spouse/partner) expect to spend in total on audiovisual equipment, such as a television, DVD player or MP3 Players? If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}

SPEN2B
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spend in total on mobile phone handsets, games consoles, cameras or computer equipment, used mainly for things other you’re your course? If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}
SPEN3
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spend in total on furniture, household appliances and other household goods worth more than £50? If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}
SPEN4
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spend in total on glasses, contact lenses and dental/medical treatments (including prescription costs and medical insurance)? If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}
SPEN5
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spend in total on clothes, shoes and accessories? If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}
SPEN6
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spend in total on insuring your possessions including buildings/ household or contents insurance? If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}
SPEN7
Excluding anything you have already told us about, over the whole academic year from DATE to DATE, how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spend in total on any other items worth over £50 – please include gifts and money spent on sporting activities or hobbies? Please only include items worth over £50. If you are not sure of the exact amount, please give your best estimate. If you have not bought any items, please answer 0.

{Ask all}
Diar3
Now thinking of the average week, how much do you spend in the average week on CDs, downloaded music and DVDs (bought and rented)? Please include items that you bought even if they are not something you would normally buy in an average week.
Numeric: Range 0 to 2000

{Ask all}
Diar4
How much did you spend in the average week on newspapers, magazines, books, stationery and postage (not needed for your course)? Please include items that you bought even if they are not something you would normally buy in an average week.
Numeric: Range 0 to 2000

{Ask all}
Diar5
How much did you spend in the average week on toiletries and medicine? Please include items that you bought even if they are not something you would normally buy in an average week.
Numeric: Range 0 to 2000

{Ask all}
Diar6
How much did you spend in the average week on cigarettes, tobacco and alcohol (consumed outside the home – e.g. in a bar, pub or someone else’s home)?
Numeric: Range 0 to 2000

{Ask all}
Diar7
How much did you spend in the average week on meals and snacks from cafes, pubs, restaurants, shops, work, takeaways, college or student union premises?
Numeric: Range 0 to 2000
How much do you spend in the average week on entertainment – please include trips to the cinema or theatre, entry to nightclubs, attending sporting events, participating in clubs and societies and religious activities? *If you are not sure of the exact amount, please give your best estimate.*
Numeric: Range 0 to 2000

How much did you spend in the average week on food and drink bought to consume at home?
Numeric: Range 0 to 2000

How much did you spend in the average week on household goods (such as cleaning materials and pet food) and laundry or dry cleaning?
Numeric: Range 0 to 2000
1.26 background

1.26.1 Remaining student background

1.26.2 Previous education

{Ask all}
QUAL1
What type of school did you attend for most of the time between the ages of 11 to 16 - was it a state school, including grant maintained, or was it another type of school, for example an independent or private school?
State (including grant maintained)
Other (e.g. independent or private school)

{Ask all}
QUAL2
Which of these was your highest qualification before studying at (university/college/Open University)?
Foundation Year
Foundation Degree
A levels (including A2 and AS levels) or International Bacclaureate
Scottish higher
GNVQ/NVQ Level 3/ AVCEs
GCSEs/O Levels
BTEC National Diploma
Qualification from an Access course
Other Higher Education Qualification (such as a undergraduate degree, Masters)
HND/HNC
Diploma or Certificate in Higher Education
None of these
Other (please specify)

1.26.3 Parental HE background

{Ask all}
HEPAR1
Did either of your parents stay on at school after the age of 16? Please include step-parents if you feel you have been brought up by them.
Yes
No

{Ask all}
HEPAR2
Have either of your parents attended a university or college of higher education, including polytechnics? *Please include step-parents if you feel you have been brought up by them.*
Yes
No

1.26.4 NS-SEC (or student background)

Full-time students who are independent students

{Ask full-time students who are independent students}
Awork1
We would now like to ask you a bit about your background. Before starting this college course, had you ever been in paid work?
Yes
No.

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}
Awork2
What did the firm/organisation mainly make or do? *Please enter a full description.*
Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}
Awork3
What was your (main) job? *Please enter your job title.*
Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}
Awork4
What did you mainly do in your job? *Please enter a full description. For example, if you are a teacher, do you teach primary or secondary pupils? If you are an engineer, what type of engineer are you – e.g. electrical, chemical, civil etc?*
Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}
Awork5
What training or qualifications were needed for that job? *Please enter a full description, including grade or level where appropriate.*
Open type answer
{Ask full-time students who are independent students. Ask those who had been in paid work before the course} 
Awork6 
Were you an employee or were you self-employed in this job? 
Employee 
Self-employed 

{Ask full-time students who are independent students. Ask those who had been in paid work before the course} 
Awork7 
Were you working full-time or part-time? 
Full-time 
Part-time 

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were an employee} 
Awork8 
Did you have formal responsibility for supervising the work of other employees? Please answer 'no' if you only supervise children (e.g. teachers, nannies, childminders), animals or security or buildings (e.g. caretakers, security guards). 
Yes 
No 

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were an employee. And if has responsibility for supervision} 
Awork9 
Please describe the type of responsibility you had for supervising the work of other employees? Please enter a full description. 
Open type answer 

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were an employee} 
Awork10 
How many employees were there at the place where you worked? This is the total number of employees within the 'local unit' at which the respondent works (the location where their job is mainly carried out). Normally this is a single building, part of a building, or at the largest, a self-contained group of buildings. 
1-9 
10-24 
25-499 
500 or more
{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were self-employed}
AWork11
Were you working on your own or did you have any employees?
On own/with partner(s), but no employees
With employees

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were self-employed and has employees}
AWork12
How many people did you employ at the place where you worked?
1-9
10-24
25-499
500 or more

Full-time students who are dependent students

{Ask full-time students who are dependent students}
Bwork1
We would now like to ask you a bit about your background. Please think about the person who was the main income earner in your household just prior to starting your current course. Were they in paid work before you started your current course?
Yes
No

{Ask full-time students who are dependent students}
Bwork2
Still thinking about the main income earner, we’d like to ask about their occupation just prior to you starting your course... what did the firm/organisation mainly make or do where he/she worked? Please enter full description.
Open type answer

{Ask full-time students who are dependent students.}
Bwork3
What was his/her (main) job? Please enter the job title.
Open type answer

{Ask full-time students who are dependent student }
Bwork4
What did he/she mainly do in his/her job? Please enter a full description. For example, if he or she is a teacher, do they teach primary or secondary pupils? If he or she is an engineer, what type of engineer are they – e.g. electrical, chemical, civil etc?
Open type answer

{Ask full-time students who are dependent students }
Bwork5
What training or qualifications were needed for that job? Please enter full description, including grade or level where appropriate.
Open type answer

{Ask full-time students who are dependent students}
Bwork6
Was he/she an employee or was he/she self-employed in this job?
Employee
Self-employed

{Ask full-time students who are dependent students}
Bwork7
Was he/she working full-time or part-time?
Full-time
Part-time

{Ask full-time students who are dependent students. And if they were an employee}
Bwork8
Did he/she have formal responsibility for supervising the work of other employees? Please answer ‘no’ for people who only supervise children (e.g. teachers, nannies, childminders), animals or security or buildings (e.g. caretakers, security guards).
Yes
No

{Ask full-time students who are dependent students. And if they were an employee. And if has responsibility for supervision}
Bwork9
Please describe the type of responsibility he/she had for supervising the work of other employees? Please enter a full description.
Open type answer

{Ask full-time students who are dependent students. And if they were an employee}
Bwork10
How many employees were there at the place where he/she worked? This is the total number of employees within the ‘local unit’ at which the person works (the location
where their job is mainly carried out). Normally this is a single building, part of a building, or at the largest, a self-contained group of buildings.

1-9
10-24
25-499
500 or more

{Ask full-time students who are dependent students. And if they were self-employed}
BWork11
Was he/she working on his/her own or did he/she have any employees?
On own/with partner(s), but no employees
With employees

BWork12
How many people did he/she employ at the place where he/she worked?
1-9
10-24
25-499
500 or more

Part-time students and OU students

Cwork1b
Before starting this college course, had you ever been in paid work?
Yes
No.

Cwork2
TEXTFILL: IF CASH=yes: We'd like to ask you a bit more about your job. We are referring to the job (or jobs) you said that you do (or have done) this academic year.
TEXTFILL: IF NOT CURRENTLY WORKING, BUT HAS IN THE PAST: We'd like to ask you now about your last job before starting the course. What does/did the firm/organisation mainly make or do? Please enter a full description.
Open type answer

Cwork3
What is/was your (Textfill if Wrk>1 main) job? Please enter the job title.
Open type answer

{Ask part-time students and OU students. Ask those who are or had been in paid work before the course}
Cwork4
What do/did you mainly do in your job? Please enter a full description. For example, if you are a teacher, do you teach primary or secondary pupils? If you are an engineer, what type of engineer are you – e.g. electrical, chemical, civil etc? Enter description.
Open type answer

{Ask part-time students and OU students. Ask those who are or had been in paid work before the course}
Cwork5
What training or qualifications are/were needed for that job? Please enter a full description, including grade or level where appropriate.
Open type answer

{Ask part-time students and OU students. Ask those who are or had been in paid work before the course}
Cwork6
Are/were you an employee or are/were you self-employed in this job?
Employee
Self-employed

{Ask part-time students and OU students. Ask those who are or had been in paid work before the course}
Cwork7
Are/were you working full-time or part-time?
Full-time
Part-time

{Ask part-time students and OU students. Ask those who are or had been in paid work before the course. And if they were an employee}
Cwork8
Do/did you have formal responsibility for supervising the work of other employees? Please answer ‘no’ if you only supervise children (e.g. teachers, nannies, childminders), animals or security or buildings (e.g. caretakers, security guards).
Yes
No
{Ask part-time students and OU students. Ask those who are or had been in paid work before the course. And if they were an employee. And if has responsibility for supervision} CWork9
Please describe the type of responsibility you have/had for supervising the work of other employees? Please enter a full description.
Open type answer

{Ask part-time students and OU students. Ask those who are or had been in paid work before the course. And if they were an employee} CWork10
How many employees are/were there at the place where you work/worked? This is the total number of employees within the 'local unit' at which the respondent works (the location where their job is mainly carried out). Normally this is a single building, part of a building, or at the largest, a self-contained group of buildings.
1-9
10-24
25-499
500 or more

{Ask part-time students) and OU students. Ask those who are or had been in paid work before the course. And if they were self-employed} CWork11
Are/were you working on your own or do/did you have any employees?
On own/with partner(s), but no employees
With employees

{Ask part-time students and OU students. Ask those who are or had been in paid work before the course. And if they were self-employed and has employees} CWork12
How many people do/did you employ at the place where you worked?
1-9
10-24
25-499
500 or more

1.27 Other

{Ask students who lived in Wales before their course} WELID
What do you consider your national identity to be. Please choose your answer from the card - choose as many or as few as apply?
Welsh
English
Scottish
British
Other

{Ask students who lived in Wales before their course who say “other” national identity}

How would you describe your national identity? Please enter your answer in the box.
Open answer

{Ask all}

ETH
To which of these groups do you consider you belong?
White - British
White - Irish
Any other white background (please describe)
Mixed - White and Black Caribbean
Mixed - White and Black African
Mixed - White and Asian
Any other mixed background (please describe)
Asian or Asian British - Indian
Asian or Asian British - Pakistani
Asian or Asian British - Bangladeshi
Any other Asian/Asian British background (please describe)
Black or Black British - Caribbean
Black or Black British - African
Any other Black/Black British background (please describe)
Chinese
Any other (please describe)

{Ask if an “other” ethnic group is given}

ETHOTH
Please can you describe your ethnic group?
Open answer: up to 100 characters

{Ask all}

DISAB
Do you have any health conditions or illnesses which affect you in any of the following areas? Tick all that apply
Vision (for example blindness or partial sight)
Hearing (for example deafness or partial hearing)
Mobility (for example walking short distances or climbing stairs)
Dexterity (for example lifting and carrying objects, using a keyboard)
Learning or understanding or concentrating
Memory
Mental health
Stamina or breathing or fatigue
Socially or behaviourally (for example associated with autism, attention deficit disorder or Asperger’s syndrome)
Other (please specify)
None of the above

{Ask all}
Are you male or female?
Male
Female

{Ask all}
RELIG
What is your religion?
No religion
Christian (including C of E, Catholic, Protestant and all other Christian denominations)
Buddhist
Sikh
Muslim
Hindu
Jewish
Other

1.28 Re- contacting

{Ask all}
THANK2
Thank you very much for your help and for answering the questions. For quality purposes some interviews in a survey are checked to make sure that people like yourself are satisfied with the way the interview was carried out. Your contact details may be used so that someone at National Centre for Social Research can contact you about this in the future.
CODE 1 AND CONTINUE
SPONTANEOUS ONLY: USE IF RESPONDENT NOT HAPPY FOR THIS RECONTACT

{Ask all}
RECONT
If the Department for Business Innovation and Skills wanted to do a follow-up to this study, would you be willing for us to pass your details to them or another research organisation like ourselves?
1. Yes – willing for details to be passed on
2. No – not willing for details to be passed on

{Ask all}
And finally, more could be learnt about students and their qualifications and finances by linking your answers from these questions to administrative records held by the Department for Education, the Welsh Government, the Higher Education Statistics Agency and Student Loans Company. The linkage will be made in accordance with the Data Protection Act by an independent research organisation. This linked information will only be used for research purposes in line with the Act.

Could we have your consent for these records to be linked to your answers?
Yes
No

**Department for Education**
Survey data would be linked with the National Pupil Database which contains information about pupils and their qualifications that has been collected from schools and qualification awarding bodies. This would allow researchers to learn more about how students move from school to higher education.

**Welsh Government**
Survey data would be linked with the National Pupil Database which contains information about pupils and their qualifications that has been collected from schools and qualification awarding bodies. This would allow researchers to learn more about how students move from school to higher education.

**Higher Education Statistics agency (HESA)**
HESA is the agency responsible for collecting, analysing and publishing statistics about higher education in the UK. Linking to HESA data would allow information such as the qualification you are aiming towards and your degree result to be used alongside the survey information. This would allow researchers to better understand how the findings of this survey relate to higher education students as a whole.

**Student Loans company (SLC)**
Linking to SLC data would allow information about your application for support to the SLC and the exact record of the financial support you receive to be used alongside the survey information. This would allow researchers to better understand how financial support affects students’ experiences of higher education.

{Ask all}
THANK1
You have now completed the questionnaire. Thank you for your help with this.

We would now like you to fill in a diary of spending for the next seven days. This will only take around 5 minutes per day to fill in and you will receive a £20 Amazon voucher at the end of the week as a token of our appreciation.
Would you be prepared to complete an online diary?
Appendix 2 – Student Expenditure Diary

Please enter the date you wish to start the diary. This should be today’s date or a date in the near future. You should complete the diary at the end of each day (or first thing the next morning).

Each day of the diary will take between 5 and 10 minutes to complete. There are seven short pages to fill out every day, covering your spending on things like travel, going out and food and drink.

You need to fill in all seven days of the diary to receive the Amazon voucher.

Enter the date in the format dd/mm/yyyy for example 12/12/2012

- Next

Please confirm that you wish to start keeping the diary on XX/XX/XXX

If this is not correct please go back and change it.

- Previous
- Next
- Save

Please enter the email address you would like the voucher code to be emailed to.

- Previous
- Next
- Save

Please select the day of the diary you wish to complete

Day 1  Date: XX/XX/2012  Wednesday  Still to do Day 1
Day 2  Date: XX/XX/2012  Thursday  Still to do Day 2
Day 3  Date: XX/XX/2012  Friday  Still to do Day 3
Day 4  Date: XX/XX/2012  Saturday  Still to do Day 4
Day 5  Date: XX/XX/2012  Sunday  Still to do Day 5
Day 6  Date: XX/XX/2012  Monday  Still to do Day 6
Day 7  Date: XX/XX/2012  Tuesday  Still to do Day 7
Travel

Section 1 of 7  Day 1  Date : XX/XX/2012  Wednesday

Please write in the amounts of money spent on each item pounds and pence.

If no expenditure on any of the items please select 'No Expenditure' at bottom of this page

Fares paid between college or work and home
Fares paid between college or work and home
Fares paid for leisure travel
Parking paid for leisure
Fares paid to and from child's school/nursery etc (if applicable)
Petrol for car, van, motorbike or scooter

Please confirm this expenditure, and select next for the next section
- Confirm that the expenditure is correct
- No expenditure on any of the above items today

- Previous
- Next
- Save
Lifestyle / entertainment

Section 2 of 7  Day 1  Date : XX/XX/2012  Wednesday

Please write in the amounts of money spent on each item pounds and pence.

If no expenditure on any of the items please select 'No Expenditure' at bottom of this page

Cinema, theatre, concerts

Entry to nightclubs, discos etc

Sports (spectating or participating), hobbies, clubs and societies

Religious activities

National lottery or betting

Other entertainment (write in details below)

Please confirm this expenditure, and select next for the next section
- Confirm that the expenditure is correct
- No expenditure on any of the above items today

- Previous
- Next
- Save
Personal items

Section 3 of 7  Day 1  Date : XX/XX/2012  Wednesday

Please write in the amounts of money spent on each item pounds and pence.

If no expenditure on any of the items please select 'No Expenditure' at bottom of this page

Please include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc CDs, downloaded music, DVDs, videos etc (bought or rented)

Cigarettes, tobacco

Newspapers, magazines, books, stationery or postage (not needed for your course)

Gifts and cards e.g. for birthdays

Prescriptions and other medicines

Toiletries

Please confirm this expenditure, and select next for the next section

- Confirm that the expenditure is correct
- No expenditure on any of the above items today

- Previous
- Next
- Save
Childcare

Section 4 of 7  Day 1  Date : XX/XX/2012  Wednesday

Please write in the amounts of money spent on each item pounds and pence.

If no expenditure on any of the items please select 'No Expenditure' at bottom of this page

Please include your own or a partner/spouse’s spend on your children, or his/her children

Play school, nursery or crèche fees
Babysitting, child minding, au pair or nanny
School lunches and milk
Toys, children’s books or other children’s gifts
Child’s outings/entertainment
Other spending for children (write in details below)

Please confirm this expenditure, and select next for the next section
  • Confirm that the expenditure is correct
  • No expenditure on any of the above items today
  • Previous
  • Next
  • Save
Food and drink outside the home

Section 5 of 7  Day 1  Date : XX/XX/2012  Wednesday

Please write in the amounts of money spent on each item pounds and pence.

If no expenditure on any of the items please select 'No Expenditure' at bottom of this page

Please include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises

Beer, wine, spirits or other alcoholic drinks

Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)

Please confirm this expenditure, and select next for the next section

- Confirm that the expenditure is correct
- No expenditure on any of the above items today

- Previous
- Next
- Save
Household items

Section 6 of 7  Day 1  Date : XX/XX/2012       Wednesday

Please write in the amounts of money spent on each item pounds and pence.

If no expenditure on any of the items please select 'No Expenditure' at bottom of this page

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)
Beer, wine, spirits or other alcoholic drinks bought to consume at home
Household goods, cleaning materials, pet food etc
Servicing or repairs to personal or household equipment
Laundry or dry cleaning
Payments into a kitty or common pool (excluding a joint account)

Please confirm this expenditure, and select next for the next section
- Confirm that the expenditure is correct
- No expenditure on any of the above items today

- Previous
- Next
- Save
Other spending that has not been covered elsewhere

Section 7 of 7  Day 1  Date : XX/XX/2012  Wednesday

Write in a description

Write in a description

Write in a description

Have you finished entering in all your spending for this day?

- Yes
- No
- Previous
- Next
- Save
Appendix 3 – Coding and Editing Instructions

Student Income and Expenditure Survey 2011/12 – Coding and Editing

May 2012
1.29 Section 1: Introduction

1.29.1 Background to the project

The Student Income and Expenditure Study will provide information on the finances of HE students in England and Wales in the academic year 2011/12.

In the last decade the types of financial support that higher education students can draw on have been changing. In particular student loans have been getting larger to cover the cost of rising tuition fees, a trend that is set to continue. In addition, there has been increasing differences between the support available for students in the English system and the support available for students in the Welsh system (e.g. non-repayable fee grants are available to Welsh students studying in Wales whereas these are no longer available for English students).

The Student Income and Expenditure Survey 2011-12 is the latest in a series of surveys that have been running since the mid 1980s. The current study is particularly important as it will provide a robust baseline against which future changes to the student funding regime will be measured.

The key objectives of the study are:

- To provide an authoritative and objective report on the finances of HE students in England and Wales in the academic year 2011/12;
- To collect detailed and comprehensive data on students’ incomes, expenditure, debt and experience of financial hardship;
- To identify any differences in the levels of income, expenditure, debt and financial hardship between students with different characteristics and from different backgrounds;
- To identify groups of students who benefit from targeted support measures, such as students with children, students with disabilities and those from low income families;
- To monitor changes in students’ financial position over time, by comparing results with previous rounds of the survey;
- To provide a baseline against which to measure and evaluate future changes to the student funding regime.

1.29.2 Who is involved in this project

The current study is being commissioned by the Department for Business, Innovation and Skills (BIS), along with the Welsh Assembly Government (WG). This series of surveys allows BIS and WG to monitor the impact of its student support arrangements on current students in Higher Education (HE).
The Questionnaire

The questionnaire can be broken down into the following broad sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Topics covered</th>
</tr>
</thead>
</table>
| A. Introduction and background       | • Eligibility for the study  
• Classification questions for later routing in the questionnaire                                                                          |
| B. Tuition Fees                      | • How much tuition fees charged by institution  
• Use of Student Loans for fees  
• How else the student is paying for their tuition fees (aside from loan), including support from family, their institution or others |
| C. Higher Education Related Income   | • Screener questions on other types of support received, including loans and grants for maintenance/living costs.  
• Amount of support received.                                                     |
| D. Other Income                      | • Other income the student gets through:  
  - Employment  
  - Benefits  
  - A partner’s income  
  - Maintenance payments  
  - Parents and other relatives  
  - Savings  
  - Sale of books and other possessions  
  - Other sources, including gifts                                                  |
| E. Commercial Credit/Overdrafts      | • Any commercial loans, credit cards/ store cards.                                                                                           |
### F. Expenditure
- Students’ spending on a range of things e.g.:
  - Housing
  - Council tax
  - Household expenditure
  - Bills
  - Telephones
  - Travel
  - Books and equipment
  - Children/childcare
- Other expenditure
- Students’ spending on a range of items costing more than £50 e.g.: clothes, household appliances, insurance
- Students’ spending on day-to-day items, such as food and drink and going out

### G. Background information
- Questions about the students’ background, e.g. parental education, disability.

### H. End of interview
- Acceptance/placement of diary.
- Recontact and data linkage.

### 1.29.4 The Diary
As well as filling in the main questionnaire, respondents are asked to fill in a student spending diary. This diary is filled in by students for seven days after the main interview.

The aim of the diary is to pick up day-to-day spending that was not covered in the questionnaire.

The diary covers seven days of various types of daily spending, including:

- Travel
- Lifestyle/Entertainment
- Personal items
- Child-related spend
- Food and drink outside the home
- Household items
- Other spending that has not been covered elsewhere.

There diary is filled out online. Students were given web ID numbers and passwords to give them access to their own copy of the diary.

The diary data and the questionnaire data will be analysed together to give an overall measure of spending.

Therefore it is important in the editing process that we take into account whether or not diary items have already been asked about in the main
1.30 Section 2: Main questionnaire

Coding

The coding of interviewer responses is by and large taken care of within the CATI through the use of fully closed questions. However, for some questions where a respondent’s answer does not fit into one of the closed options, the interviewer can transcribe the answer.

‘Other – please specify’ questions

In many instances it will be possible to code ‘Other’ responses back into the existing code frame. This should always be the coder’s first response. However, this will not always be possible, as new, distinct groups of responses may emerge. The researchers have looked at some early returns from the field and decided where new codes might be necessary. Coders should use these where the existing code frame is not appropriate.

When you have backcoded an ‘other’ answer into the codes in the question you will need to make sure you remove the ‘other’ code on that question. Please note the ‘other’ codes will be different numbers in each question- depending on the length of the question. They normally appear towards the end of the list of codes in the box.

If the response given in the ‘other’ question doesn’t fit into any of the codes, you can leave it in the other question- please only do this where really necessary and try to avoid leaving too many codes in ‘other’.

Interviewers also sometimes type ‘Don’t know’ or ‘Refused’ into ‘Other specify’ questions. In these situations, please use the following:

If response is:
♦ Refused, confidential, no comment, personal reasons = code as Refusal ‘Ctrl R’
♦ Don’t know, not sure = code as Don’t know ‘Ctrl K’.

Editing

The editor’s role is to tidy up the data when it arrives from the field in order to improve the data quality and accuracy for the client. The main tasks will be to interpret interviewer memos, to rid the data of any errant codes, and to resolve any inconsistencies. Please ask if the situation encountered has not been covered by briefing or these materials.

Please note you should NEVER delete a case unless you have been instructed to do so by a researcher.
1. Only option available / no suitable full-time course available

2. Had a full time (or part time) job / wanted or needed to continue working / course required respondent to work at same time as studying / course paid for by respondent’s employer

3. Have family commitments / caring for household member

4. Had to study part-time to avoid reductions in social security benefits/allowances

5. Could not afford to study full time/ didn’t want to get into debt/ fees more affordable for part time course

6. Because of the new student funding regime

7. Did not have entry qualifications to study full-time course

8. Other reason (NO LONGER VALID)

9. Reason relating to a health issue/ disability

10. Studying for pleasure only

11. Prefers part time pace

12. Doing another course at the same time as this one

95. Other specific answer EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE

96. Other vague or irrelevant answer

97. Other answer, not codeable
How would you describe your main subject?

1. Agriculture and related subjects (D400 – D990)
2. Architecture, Building and Planning (K100 – K990)
3. Biological Sciences (including Psychology) (C100 – C990)
4. Business and Administrative Studies (N100 – N990)
5. Computer Sciences (G400 – G990)
6. Creative Arts and Design (W100 – W990)
7. Education (X100 – X990)
8. Engineering and Technology (H100 – H990), (J100 – J990)
9. Medicine and Dentistry (A100 – A990)
10. Subjects allied to Medicine (B100 – B990)
11. Veterinary Science (D100 – D390)
12. Physical Sciences (F100 – F990)
13. Mathematical Sciences (G100 – G390)
14. Historical and Philosophical studies (V100 – V990)
15. Mass Communications and Documentation (P100 – P990)
16. Languages (including English and Classics) (Q100- Q990), (R100 – R990), (T100 – T990)
17. Law (M100 – M990)
18. Social Studies (including Economics, Politics, Geography) (L100- L990)
19. Combine
20. Other

Coding frame to be developed based on look-up table:
http://www.hesa.ac.uk/index.php?option=com_content&task=view&id=894&Itemid=263
Did your university or college pay something towards the costs of your tuition fees through...

1. A bursary or scholarship / financial support / grant / money into bank account
2. A fee waiver/ university paid the cost of the fees or course or module(s)
3. Additional Fee Support Scheme
4. Other (NO LONGER VALID)
5. Access to Learning Fund

95. Other specific answer EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE
96. Other vague or irrelevant answer
97. Other answer, not codeable
Did your university or college pay something towards the costs of your tuition fees through…

1. It affected my decision to study full-time or part-time
2. It affected my decision of whether to study at a nearby university so I could live with my family rather than going to a different university where I would have to live independently
3. It affected my decision to study in England or Wales (only students studying in England)
4. It affected my decision to study in Wales (only students studying in Wales)
5. It affected my decision to study in London or not
6. It affected my decision about what course to take
7. It affected my decision about what institution to attend
8. It affected my decision to study in another way (NO LONGER VALID)
9. I would not have studied without funding
10. None of these
95. Other specific answer EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE
96. Other vague or irrelevant answer
97. Other answer, not codeable
Do you currently receive any of these benefits or allowances in your own right (IF MARRIED/LIVING WITH PARTNER or in your partner’s name)?

<table>
<thead>
<tr>
<th></th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Child Benefit</td>
</tr>
<tr>
<td>2.</td>
<td>Child Tax Credit</td>
</tr>
<tr>
<td>3.</td>
<td>Retirement Pension or Widow’s pension</td>
</tr>
<tr>
<td>4.</td>
<td>Pension Credit</td>
</tr>
<tr>
<td>5.</td>
<td>Carer’s Allowance (previously Invalid Care Allowance)</td>
</tr>
<tr>
<td>6.</td>
<td>Employment &amp; Support Allowance</td>
</tr>
<tr>
<td>7.</td>
<td>Working Tax Credit</td>
</tr>
<tr>
<td>8.</td>
<td>Childcare element of Working Tax Credit</td>
</tr>
<tr>
<td>9.</td>
<td>Job Seeker’s Allowance (JSA) / Other unemployment benefits</td>
</tr>
<tr>
<td>10.</td>
<td>Income Support</td>
</tr>
<tr>
<td>11.</td>
<td>Housing Benefit</td>
</tr>
<tr>
<td>12.</td>
<td>Local Housing Allowance</td>
</tr>
<tr>
<td>13.</td>
<td>Other state benefits (NO LONGER VALID)</td>
</tr>
<tr>
<td>14.</td>
<td>None of these (NO LONGER VALID)</td>
</tr>
<tr>
<td>15.</td>
<td>Council Tax Benefit</td>
</tr>
<tr>
<td>16.</td>
<td>Pension Fund</td>
</tr>
<tr>
<td>17.</td>
<td>Any disability/invalidity/incapacity/sickness benefit (including Disability Living Allowance or DLA)</td>
</tr>
<tr>
<td>18.</td>
<td>Council Tax discount because of being a student</td>
</tr>
<tr>
<td>19.</td>
<td>A general disabled students’ allowance/ Specialist equipment allowance/ A non-medical helpers’ allowance/ Extra travel costs because of a disability</td>
</tr>
<tr>
<td>95.</td>
<td>Other specific answer EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE</td>
</tr>
<tr>
<td>96.</td>
<td>Other vague or irrelevant answer</td>
</tr>
<tr>
<td>97.</td>
<td>Other answer, not codeable</td>
</tr>
<tr>
<td>98.</td>
<td>Don’t know</td>
</tr>
<tr>
<td>99.</td>
<td>Refusal</td>
</tr>
</tbody>
</table>

*Q.OInc*
Which of the following best describes where you live?

1. Alone in rented house/flat/lodgings
2. Alone in a flat/house you are buying or own or share
3. With parents/step-parents/ or spouse’s parents
4. In a house/flat owned by your parents/step-parents/ (but not living with them)
5. With a spouse/partner/relatives or children in a flat/house I/we are buying or own
6. With a spouse/partner/relatives or children in a flat/house I/we rent
7. With friends/students/other non-relatives (including landlord/owner of property) in a house/flat/lodgings/room I/we rent (not provided by your University/college)
8. University/College provided accommodation e.g. halls of residence/student flat/hostel
9. Other (NO LONGER VALID)
10. With friends/students in a house/flat we are buying or own
11. In a house/flat owned by grandparents or other relatives (but not living with them)
12. With grandparents or other relatives
95. Other specific answer EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE
96. Other vague or irrelevant answer
97. Other answer, not codeable
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Foundation Year</td>
</tr>
<tr>
<td>2.</td>
<td>Foundation Degree</td>
</tr>
<tr>
<td>3.</td>
<td>A levels (including A2 and AS levels) or International Baccalaureate</td>
</tr>
<tr>
<td>4.</td>
<td>Scottish Highers</td>
</tr>
<tr>
<td>5.</td>
<td>GNVQ/NVQ Level 3/ AVCEs/ City and Guild Level 3</td>
</tr>
<tr>
<td>6.</td>
<td>GCSEs/O Levels/ BTEC Level 1 or 2</td>
</tr>
<tr>
<td>7.</td>
<td>BTEC National Diploma/ BTEC Level 3</td>
</tr>
<tr>
<td>8.</td>
<td>Qualification from an Access course</td>
</tr>
<tr>
<td>9.</td>
<td>Other Higher Education Qualification (such as a undergraduate degree, Masters, PhD, BA, BSc)</td>
</tr>
<tr>
<td>10.</td>
<td>HND/HNC</td>
</tr>
<tr>
<td>11.</td>
<td>Diploma or Certificate in Higher Education/ BTEC Professional Diplomas, Certificates or Awards/ NVQ Level 4</td>
</tr>
<tr>
<td>12.</td>
<td>Other (NO LONGER VALID)</td>
</tr>
<tr>
<td>13.</td>
<td>None of these (NO LONGER VALID)</td>
</tr>
<tr>
<td>95.</td>
<td>Other specific answer (including foreign qualifications) EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE</td>
</tr>
<tr>
<td>96.</td>
<td>Other vague or irrelevant answer</td>
</tr>
<tr>
<td>97.</td>
<td>Other answer, not codeable</td>
</tr>
</tbody>
</table>
What do you consider your national identity to be?

1. Welsh
2. English
3. Scottish
4. British

95. Other specific answer EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE
96. Other vague or irrelevant answer
97. Other answer, not codeable
To which of these groups do you consider you belong?

1. White – British (Include White Scottish, White English and White Welsh)
2. White - Irish
3. Any other white background
4. Mixed - White and Black Caribbean
5. Mixed - White and Black African
6. Mixed - White and Asian
7. Any other mixed background
8. Asian or Asian British - Indian
9. Asian or Asian British - Pakistani
10. Asian or Asian British - Bangladeshi
11. Any other Asian/Asian British background
12. Black or Black British - Caribbean
13. Black or Black British - African
14. Any other Black/Black British background
15. Chinese
16. Other (NO LONGER VALID)
95. Other specific answer EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE
96. Other vague or irrelevant answer
97. Other answer, not codeable
Do you have any health conditions or illnesses which affect you in any of the following areas?

1. Vision (for example blindness or partial sight)
2. Hearing (for example deafness or partial hearing)
3. Mobility (for example walking short distances or climbing stairs)
4. Dexterity (for example lifting and carrying objects, using a keyboard)
5. Learning or understanding or concentrating (including Dyslexia)
6. Memory
7. Mental health (including depression, anxiety, stress)
8. Stamina or breathing or fatigue (including Asthma)
9. Socially or behaviourally (for example associated with autism, attention deficit disorder or Asperger's syndrome)
10. Other (NO LONGER VALID)
11. None of these (NO LONGER VALID)

95. Other specific answer (including Diabetes, Epilepsy, HIV, MS etc) EDITOR: PLEASE USE CODES ABOVE IF POSSIBLE
96. Other vague or irrelevant answer
97. Other answer, not codeable
Awork2
What did the firm/organisation mainly make or do? Please enter a full description.

Awork3
What was your (main) job? Please enter your job title.

Awork4
What did you mainly do in your job? Please enter a full description. For example, if you are a teacher, do you teach primary or secondary pupils? If you are an engineer, what type of engineer are you – e.g. electrical, chemical, civil etc?

Awork5
What training or qualifications were needed for that job? Please enter a full description, including grade or level where appropriate.

Awork9
Please describe the type of responsibility you had for supervising the work of other employees? Please enter a full description.

<table>
<thead>
<tr>
<th>Question</th>
<th>Edit required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q.BackG</td>
<td>SIC Coding</td>
</tr>
<tr>
<td>AWork2</td>
<td></td>
</tr>
<tr>
<td>BWork2</td>
<td></td>
</tr>
<tr>
<td>CWork2</td>
<td></td>
</tr>
<tr>
<td>Q.BackG</td>
<td>SOC Coding</td>
</tr>
<tr>
<td>AWork3, Awork4, Awork5, AWork9</td>
<td></td>
</tr>
<tr>
<td>BWork3, Bwork4, Bwork5, BWork9</td>
<td></td>
</tr>
<tr>
<td>CWork3, Cwork4, Cwork5, CWork9</td>
<td></td>
</tr>
</tbody>
</table>

The diary data and the questionnaire data will be analysed together to give an overall measure of spending.

Therefore it is important in the editing process that we take into account whether or not diary items have already been asked about in the main questionnaire or not.
4.3 Section 3: Diary

For each day filled in on the diary there are 4 ‘other’ items which may need editing.

The aim of these “other” codes was to allow students to write in spending that did not fit into the existing categories in the diary. Three of the other codes could be any category or type of spending, whilst one should fit in the ‘lifestyle/entertainment section’ categories.

The aim of editing the diary is to either;

1. **CODE TO EXISTING CATEGORIES:** Re-code “other spending” into one of the *existing* categories in the diary (at xLSa, xOD1a, xOD2a or xOD3a).

   OR

2. **CODE TO NEW OTHER CATEGORY NOT ASKED ABOUT IN QUESTIONNAIRE:** Code other spending into a *new ‘other’* category of spending that is *has not already been asked about in the main questionnaire*

   OR

3. **CODE TO NEW OTHER CATEGORY ALREADY ASKED ABOUT IN QUESTIONNAIRE:** Code other spending into a *new ‘other’* category of spending that *has already been asked about in the main questionnaire*

   Option 3 is particularly important, as we do not want to double-count items included in the diary that have already been covered in the interview. Throughout this coding guide we have included lists of spending already covered in the questionnaire.

**PLEASE NOTE:**

If the description of the “other” item is “0” or “N/A” or “–” or similar, this should be deleted, along with the amount (assuming the amount is 0 or blank). Please delete from the following fields:

- “QDAY[ ].QLifeStyle. OtherDesc”
- “QDAY[ ].QOTHER.OtherDesc1”
- “QDAY[ ].QOTHER.OtherDesc2”
- “QDAY[ ].QOTHER.OtherDesc3”

If the respondent has written the amount in the “other” string field (e.g. “Pub £10”) you will need to manually enter the amount at the following fields:

- “QDAY[ ].QLifeStyle. Otherpounds” and “QDAY[ ].QLifeStyle.Otherpence” OR
• "QDAY[ ].QOTHER.OtherPounds1" and "QDAY[ ].QOTHER.OtherPence1" OR
• "QDAY[ ].QOTHER.OtherPounds2" and "QDAY[ ].QOTHER.OtherPence3" OR
• "QDAY[ ].QOTHER.OtherPounds3" and "QDAY[ ].QOTHER.OtherPence3"
1.30.1 ‘TRAVEL’ ITEMS IN THE DIARY:

Original codes:
1. Fares paid between college or work and home
2. Fares paid for leisure travel
3. Fares paid to and from child’s school/ nursery etc (if applicable)
4. Petrol for a car, van, motorbike or scooter.
5. Parking paid for college or work
6. Parking paid for leisure

New codes:
50. Other travel NOT covered in questionnaire/diary
60. Other travel covered in questionnaire

ITEMS COVERED IN MAIN QUESTIONNAIRE
• Motor vehicle tax
• Motor insurance
• Vehicle repairs
• Vehicle maintenance
• Journeys to and from parental/family home during and at start/end of term
• Buying a Bike/Moped/Motorcycle
• Buying a Car/Van
• Field trips and trips for study/coursework
• Holidays (travel there, accommodation and spending money whilst there)

Examples of “other” answers in the diary to be edited:

<table>
<thead>
<tr>
<th>Other item</th>
<th>Existing code in diary?</th>
<th>New ‘Other’ Category</th>
<th>Covered in main qre?</th>
<th>Code to be used</th>
<th>IMPORTANT NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel to and from hospital for operation</td>
<td>✅</td>
<td></td>
<td></td>
<td>2</td>
<td>All fares that are not related to study or work should be considered for leisure purposes</td>
</tr>
<tr>
<td>Taxi home from work</td>
<td>✅</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Taxi home from night-out</td>
<td>✅</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Taxi</td>
<td>✅</td>
<td></td>
<td></td>
<td>2</td>
<td>Travel where the purpose is not specified should be considered as leisure travel</td>
</tr>
<tr>
<td>Petrol</td>
<td>✅</td>
<td></td>
<td></td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Item</td>
<td>Code</td>
<td>Amount</td>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------</td>
<td>--------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bulbs for car</td>
<td>✔</td>
<td>60</td>
<td>Considered as vehicle maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car insurance</td>
<td>✔</td>
<td>60</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car wash</td>
<td>✔</td>
<td>60</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car MOT</td>
<td>✔</td>
<td>60</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Early payment of holiday</td>
<td>✔</td>
<td>60</td>
<td>Spend on holidays was covered in the main questionnaire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stayed in hotel</td>
<td>✔</td>
<td>60</td>
<td>Consider this as holiday spending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel insurance</td>
<td>✔</td>
<td>60</td>
<td>Consider this as holiday spending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hospital parking fees</td>
<td>✔</td>
<td>50</td>
<td>All parking not specifically for leisure or work should be coded as 51</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking fine</td>
<td>✔</td>
<td>50</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.30.2 LIFESTYLE / ENTERTAINMENT’ IN THE DIARY:

Original codes:
7. Cinema, theatre, concerts
8. Entry to night-clubs, discos etc
9. Sports (spectating or participating), hobbies, clubs and societies
10. Religious activities
11. National lottery or betting
12. Other entertainment (DO NOT RE-USE IN EDITING)

New codes:
51. New other lifestyle/entertainment NOT covered in questionnaire/diary
61. New other lifestyle/entertainment covered in questionnaire/diary

ITEMS COVERED IN MAIN QUESTIONNAIRE:
- Items worth over £50 including gifts and money spent on sporting activities or hobbies.

Examples of “other” answers in the diary to be edited:

<table>
<thead>
<tr>
<th>Other item</th>
<th>Existing code in diary?</th>
<th>New Other Category</th>
<th>Covered in main qre?</th>
<th>Code to be used</th>
<th>IMPORTANT NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching football</td>
<td>✓</td>
<td></td>
<td></td>
<td>9</td>
<td>Sporting activities is an existing category. Check whether over £50 – if so, should be coded as 61.</td>
</tr>
<tr>
<td>Ice-skating</td>
<td>✓</td>
<td></td>
<td></td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Bowling</td>
<td>✓</td>
<td></td>
<td></td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Wool for knitting</td>
<td>✓</td>
<td></td>
<td></td>
<td>9</td>
<td>Anything hobby or past-time related should be coded as 9. Check whether over £50 – if so, should be coded as 61.</td>
</tr>
<tr>
<td>Art materials</td>
<td>✓</td>
<td></td>
<td></td>
<td>9</td>
<td>If the description does not say that any equipment or materials is for their course, assume that it is for personal use. Check whether over £50 – if so, should be coded as 61.</td>
</tr>
<tr>
<td>Music lesson</td>
<td>✓</td>
<td></td>
<td></td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Theme park</td>
<td>✓</td>
<td></td>
<td></td>
<td>51</td>
<td></td>
</tr>
<tr>
<td>Activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pub quiz</td>
<td>✓</td>
<td></td>
<td>51</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ball ticket</td>
<td>✓</td>
<td></td>
<td>51</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Art exhibition:</td>
<td>✓</td>
<td></td>
<td>51</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NB:** The original code ‘Other lifestyle/entertainment’ 12, cannot be coded into. This is now redundant.
1.30.3 ‘PERSONAL ITEMS’ IN THE DIARY:

Original codes:
13. Clothes, shoes, accessories etc
14. CDs, downloaded music, DVDs, videos etc (bought or rented), video games
15. Cigarettes, tobacco
16. Newspapers, magazines, books, stationary or postage (not needed for your course)
17. Gifts and cards e.g. for birthdays
18. Prescriptions and other medicines
19. Toiletries
80. Beauty treatments, including haircuts, nail treatments, sun beds

New codes:
52. Other personal items NOT covered in questionnaire/diary
62. Other personal items covered in questionnaire

ITEMS COVERED IN MAIN QUESTIONNAIRE:
- Audiovisual equipment, such as a television, DVD or MP3 player
- Mobile phone handsets, games consoles, cameras or computer equipment, used mainly for things other than course
- Money spent on sport or hobbies not for course
- TV licence
- TV packages (e.g. Virgin Media/ Sky Plus)
- Mobile phone costs (including pre-pay and top-up)
- Internet costs
- Landline cost

<table>
<thead>
<tr>
<th>Other item</th>
<th>Existing code in diary?</th>
<th>New Other Category</th>
<th>Covered in main qre?</th>
<th>Code to be used</th>
<th>IMPORTANT NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eye-drops</td>
<td>✓</td>
<td></td>
<td></td>
<td>18</td>
<td>Medicines should be coded as 18 if amount is £50 or less. If over £50, should be coded as 62.</td>
</tr>
<tr>
<td>Contact lens solution</td>
<td>✓</td>
<td></td>
<td></td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Socks</td>
<td>✓</td>
<td></td>
<td></td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Item</td>
<td>Code</td>
<td>Notes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------</td>
<td>----------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Costume for fancy dress</td>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rented DVD</td>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Downloaded music/ Spotify</td>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postage</td>
<td>16</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dictaphone</td>
<td>62</td>
<td>This should have been covered in the questionnaire under “audiovisual equipment, such as television etc.”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone bill</td>
<td>62</td>
<td>Mobile and landline phone costs are covered in the questionnaire so should be coded as 62</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet bill</td>
<td>62</td>
<td>Internet costs should be coded as 62</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Glasses</td>
<td>62</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentist</td>
<td>62</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TV licence</td>
<td>62</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>XBOX video game</td>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Battery charger</td>
<td>52</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Photograph developing</td>
<td>52</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sun-bed session</td>
<td>XX</td>
<td>All beauty treatments should be coded as XX</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Haircut</td>
<td>XX</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.30.4 ‘CHILD-RELATED SPEND’ IN THE DIARY

Original codes:
20. Play school, nursery or crèche fees
21. Babysitting, child-minding, au pair or nanny
22. School lunches and milk
23. Toys, children’s books or other children’s gifts
24. Child’s outings/entertainment
25. Other spending for children

New codes:
• There are no new codes.
• All other spending relating to children can be re-coded into the original ‘other spending for children’ item 25.
• It is not necessary to know what child related spend was covered in the diary for spending related to children.

Examples of “other” answers in the diary to be edited:

<table>
<thead>
<tr>
<th>Other item</th>
<th>Existing code in diary?</th>
<th>Code to be used</th>
<th>IMPORTANT NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Took baby sister out</td>
<td>✓</td>
<td>25</td>
<td>All “other” child related spend should be coded into 25</td>
</tr>
<tr>
<td>Breakfast Club</td>
<td>✓</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Children’s toys</td>
<td>✓</td>
<td>23</td>
<td></td>
</tr>
</tbody>
</table>
1.30.5 'FOOD AND DRINK OUTSIDE THE HOME’ IN THE DIARY:

**Original codes:**
26. Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises
27. Beer, wine, spirits or other alcoholic drinks
28. Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)

**New code:**
53. Other food/drink (non alcoholic) NOT covered in diary

**ITEMS COVERED IN MAIN QUESTIONNAIRE:**
- The only food/drink covered in the diary is children’s school and packed lunches (which is under the ‘child related spend’ category)

**Examples of “other” answers in the diary to be edited:**

<table>
<thead>
<tr>
<th>Other item</th>
<th>Existing code in diary?</th>
<th>New Other Category</th>
<th>Code to be used</th>
<th>IMPORTANT NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal at restaurant</td>
<td>✓</td>
<td></td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Coffees whilst out</td>
<td>✓</td>
<td></td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>Round of drinks</td>
<td>✓</td>
<td></td>
<td>27</td>
<td>Assume these are alcoholic drinks</td>
</tr>
</tbody>
</table>

**NB**
The next section in the diary and this coding guide relates to food and drink bought to consume inside the home (e.g. grocery shopping, going to an off-licence etc)
1.30.6 ‘HOUSEHOLD ITEMS’ IN THE DIARY:

Original codes:

29. Food and drink bought to consume at home (except take-away meals/alcoholic drinks)
30. Beer, wine, spirits or other alcoholic drinks bought to consume at home
31. Household goods, cleaning materials, pet food etc
32. Servicing or repairs to personal or household equipment
33. Laundry or dry cleaning
34. Payments into a kitty or common pool (excluding a joint account)

New codes:
54. Other household items NOT covered in questionnaire/diary
64. Other household items covered in questionnaire

ITEMS COVERED IN MAIN QUESTIONNAIRE:

- Furniture, household appliances and other household goods worth more than £50
- Buildings/household or contents insurance

Examples of “other” answers in the diary to be edited:

<table>
<thead>
<tr>
<th>Other item</th>
<th>Existing code in diary?</th>
<th>New Other Category</th>
<th>Covered in main qre?</th>
<th>Code to be used</th>
<th>IMPORTANT NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food for birthday party</td>
<td>✓</td>
<td></td>
<td></td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Window cleaner</td>
<td>✓</td>
<td></td>
<td></td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Cleaner/ gardener</td>
<td>✓</td>
<td></td>
<td></td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Pet food</td>
<td>✓</td>
<td></td>
<td></td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>Building and contents insurance</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td>Padlock and key</td>
<td>✓</td>
<td></td>
<td></td>
<td>54</td>
<td></td>
</tr>
<tr>
<td>Dog vaccination</td>
<td>✓</td>
<td></td>
<td></td>
<td>54</td>
<td></td>
</tr>
<tr>
<td>Flowers and plants</td>
<td>✓</td>
<td></td>
<td></td>
<td>54</td>
<td></td>
</tr>
</tbody>
</table>
Sofa (worth £50+)

Check cost of furniture, household appliances and other household goods. If worth more than £50, will be covered in main questionnaire.

NB
TV/Video/hifi equipment etc should be coded under the ‘personal items’ category rather than ‘household’.

1.30.7 OTHER SPENDING THAT HAS NOT BEEN CATEGORISED SO FAR:

If there are outstanding items that do not fit into any of the previous categories of spending in the diary, then they should be allocated to one of the remaining new codes:

NEW CODES:

70. Course related spending covered in the questionnaire
71. Non-course relating spending covered in the questionnaire
72. Item NOT covered in the questionnaire
COURSE RELATED SPEND COVERED IN MAIN QUESTIONNAIRE:

- Computer for course work
- Postage and stationery relating to study/coursework
- Books for study/coursework
- Photocopying/printing
- Special equipment for study/coursework
- Trips connected with study is covered in the ‘travel’ section

GENERAL ITEMS COVERED IN MAIN QUESTIONNAIRE:

- Items relating to transport or travel e.g. bicycle or motor vehicle
- Audiovisual equipment, e.g. TV, DVD player, MP3 player
- Mobile phone handsets, games consoles, cameras or computer equipment, used for things other than your course
- Furniture, household appliances and other household goods worth more than £50
- Glasses, contact lenses and dental/medical treatments (worth over £50)
- Buildings/ household or contents insurance
- Other items worth more than £50 – e.g. gifts, money spent on sporting activities and hobbies
- Loan repayments
- Credit card repayments (including store cards)
- Tuition fees
- Rent
- Mortgage
- Retainer for accommodation
- Council tax payments
- Bills for water, gas, electricity, fuel
- Maintenance payments
- Miscellaneous regular payments worded “any other payments on a regular basis such as life assurance, pensions, investment savings or a mortgage in which you are not actually living in?”
Examples of “other” answers in the diary to be edited:

<table>
<thead>
<tr>
<th>Other item</th>
<th>Existing code in diary?</th>
<th>New Other Category</th>
<th>Covered in main qre?</th>
<th>Code to be used</th>
<th>IMPORTANT NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition fees</td>
<td></td>
<td></td>
<td></td>
<td>70</td>
<td>Study related spend</td>
</tr>
<tr>
<td>Revision guides for course</td>
<td></td>
<td></td>
<td></td>
<td>70</td>
<td>Study related spend</td>
</tr>
<tr>
<td>Abode in design tutorial CD</td>
<td></td>
<td></td>
<td></td>
<td>70</td>
<td>Study related spend</td>
</tr>
<tr>
<td>Presentation display book and binder file</td>
<td></td>
<td></td>
<td></td>
<td>70</td>
<td>Study related spend</td>
</tr>
<tr>
<td>Paper for printer &amp; acetates</td>
<td></td>
<td></td>
<td></td>
<td>70</td>
<td>Study related spend</td>
</tr>
<tr>
<td>........................................</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Anything without a description should be considered as 71</td>
</tr>
<tr>
<td>AA loan</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Covered in the questionnaire</td>
</tr>
<tr>
<td>Paid credit card off</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Covered in the questionnaire</td>
</tr>
<tr>
<td>Visa bill</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Covered in the questionnaire</td>
</tr>
<tr>
<td>Gas bill</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Covered in the questionnaire</td>
</tr>
<tr>
<td>Accommodation fees for son</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Covered in the questionnaire</td>
</tr>
<tr>
<td>Rent</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Covered in the questionnaire</td>
</tr>
<tr>
<td>Payment for board and lodging for three weeks</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td>Covered in the questionnaire</td>
</tr>
<tr>
<td>Building work-porch roof</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td>Not covered in qre</td>
</tr>
<tr>
<td>Horse physiotherapis</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td>Not covered in qre</td>
</tr>
<tr>
<td>Passport photos</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td>Not covered in qre</td>
</tr>
<tr>
<td>Loan to a friend</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td>Not covered in qre</td>
</tr>
<tr>
<td>Library fines</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td>Not covered in qre</td>
</tr>
<tr>
<td>Donation to charity</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td>Not covered in qre</td>
</tr>
<tr>
<td>Phone call from phone box</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td>Not covered in qre</td>
</tr>
</tbody>
</table>
Appendix 4 – Derived variables

A comprehensive overview of the income, expenditure (including diary) and borrowing derived variables. All are monetary amounts and shown in pounds. The computation of each derived variable is shown to the level of individual questionnaire/diary items. Adjustments were or students with joint financial responsibility. Variables that were adjusted for joint financial responsibility are highlighted in the table below.

Please note that the lower level derivation XFOOD had not been adjusted for joint financial responsibility in line with the other applicable expenditure derivations when the analysis and report were published (BIS, 2012, 2014). This in turn affected the reporting of higher level derivations XSPEND and XLIVING.¹ The unadjusted variables are: XFOOD, XSPEND, AND XLIVING and the adjusted variables are XFOOD2, XSPEND2, and XLIVING2

Please note that these adjustments will be made in SPSS.

INCOME, EXPENDITURE AND BORROWING DERIVED VARIABLES

<table>
<thead>
<tr>
<th>Overall</th>
<th>Category</th>
<th>Type</th>
<th>Questionnaire</th>
<th>Diary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income</td>
<td>Family &amp; friends</td>
<td>Contributions from parents and other relatives</td>
<td>DTFWHO3/ DTFWHAM3 (Parental contribution towards tuition fees for full time students)</td>
<td></td>
</tr>
<tr>
<td>[XINCOME]</td>
<td>[XFAMILY]</td>
<td>[XPARENTS]</td>
<td>DTFWHO5/ DTFWHAM5 (Contribution from other relatives towards tuition fees for full time students)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CRSOTH2/ CRSAM2 (Parental contribution towards tuition fees for part time students)</td>
<td></td>
</tr>
</tbody>
</table>

¹ This makes a difference to the averages : XFOOD (without adjustment £1970.73; with adjustment £1804.13); XLIVING (without adjustment £7068.35; with adjustment £6912.08); XSPEND (without adjustment £13918.58; with adjustment £13771.03)
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRSOTH4/ CRSAMM4</td>
<td>Contribution from other relatives towards tuition fees for part time students</td>
</tr>
<tr>
<td>CRSOU2/ CRSOUAM2</td>
<td>Parental contribution towards tuition fees for OU students</td>
</tr>
<tr>
<td>CRSOU4/ CRSOUAM4</td>
<td>Contribution from other relatives towards tuition fees for OU students</td>
</tr>
<tr>
<td>PARENTS1</td>
<td>Contributions from parents and other relatives towards living costs</td>
</tr>
<tr>
<td>PARENTS2</td>
<td>Contributions from parents and other relatives towards anything else</td>
</tr>
<tr>
<td>PARENTS3</td>
<td>Value of gifts from parents and other relatives</td>
</tr>
<tr>
<td>DTFWHO4/ DTFWHAM4</td>
<td>Partner contribution towards tuition fees for full time students</td>
</tr>
<tr>
<td>CRSOTH3/ CRSAMM3</td>
<td>Partner contribution towards tuition fees for part time students</td>
</tr>
<tr>
<td>CRSOU3/ CRSOUAM3</td>
<td>Partner contribution towards tuition fees for OU students</td>
</tr>
<tr>
<td>PARAMa / PARAMb / PARAMc</td>
<td>Partner’s income, exact figure</td>
</tr>
<tr>
<td>PARAM2 / PARNET2</td>
<td>Partner’s income, banded figure</td>
</tr>
<tr>
<td>Main sources of student support [XMSTUD]</td>
<td>Student loan for fees [XFLOAN]</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td></td>
<td>FLOANANY / FLOANAMT (Whether full time student has received any loan for fees and amount received)</td>
</tr>
<tr>
<td>Fee grant for part time students [XFEEGR]</td>
<td>CRSGRA/ CRSAM (Amount of free grant received by part time students)</td>
</tr>
<tr>
<td>Student Loan for maintenance [XMLOAN]</td>
<td>SLOAN/LAM1/LAM2 (Basic Student Loan for maintenance) (Where amounts reported by term, please multiply by 3 for annual figure.)</td>
</tr>
<tr>
<td></td>
<td>LWEEKS1/LWEEKS2/LW2/LWEEKS4 (Extra weeks allowances) (Where LWEEKS2=per week, you will need to calculate the amount of extra allowance by multiplying LW2 x LWEEKS4)</td>
</tr>
<tr>
<td>Maintenance and Special Support Grants [XMNTG]</td>
<td>MTNGE/ MTNGW/ MGP1/ MGP2 (Where amounts reported by term, please multiply by 3 for annual figure.)</td>
</tr>
<tr>
<td></td>
<td>CFC/WACC1 /WACC3 (Financial Contingency Funds in Wales)</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Other student support</td>
<td>Course Grant [XCOUGR] CRSG/CRSAMG (Course Grant for PT students)</td>
</tr>
</tbody>
</table>
| Child related support          | Child related support [XCHSUP] CHGR/CHCP1/CHC2/CHCP2 (Childcare Grant)     | Where amounts reported  
- by term, please multiply by 3 for annual figure;  
- by month, please multiply by 12, divide by 52 and multiply by 39 for annual figure  
- by week, please multiply by CHCP2 figure for annual figure  

PLA/PLAP1/PLAP2 (Parents’ Learning allowance)  
(Where amounts reported by term, please multiply by 3 for annual figure.) |
| Adult Dependants’ Grant        | Adult Dependants’ Grant [XDEP] ADG/ADGP1/ADGP2 (Adult Dependents Grant)     | (Where amounts reported by term, please multiply by 3 for annual figure.)                                                                 |
| Teaching related support       | Teaching related support [XTEACH] EITT/EITTP1/ ETT2 (Training Bursary in England)  
WITT/WITTP1/WITTP1b (Welsh course grant for ITT)  
WITT/WITTP2/WITTP2b (Welsh Teacher Training Recruitment)  
WITT/WITTP3/WITTP3b (Welsh medium supplement)  
WITT/WITTP4/WITTP4b (Teaching Grant in Wales)  
Where amounts reported |
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>
| | **NHS related support [XNHS]** | **NHSBURS/DTFWHO8/NHSB1/NHSB12 (NHS Bursary)** (Where amounts reported by term, please multiply by 3 for annual figure.)
| | LNHSXW1/ LNXW2 / LNHSXW2/ /LNHSXW4 (extra weeks allowances) (Where NHSXW2=per week, you will need to calculate the amount of extra allowance by multiplying LNXW2 x LNHSXW4)
| | NHSBA1/NHSBA2/NHSBA2A (additional allowances alongside the bursary) (Where amounts reported by month, please multiply (((NHSBA2A*12)/52)*39)
<p>| | NHSL1/NHSL2 (student loan for NHS students) |</p>
<table>
<thead>
<tr>
<th><strong>Disabled student allowances [XDISAB]</strong></th>
<th><strong>Career Development Loans [XCDL]</strong></th>
<th><strong>Employer support [XEMPL]</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>DSA1/DSA2/EQUP1 (Specialist equipment allowance)</td>
<td>CDL/CDLAM/CDLP1/CDLP2/CDLP3 (Career Development Loan)</td>
<td>DTFWHO6/ DTFWHAM6 (Employer contribution towards tuition fees for full time students)</td>
</tr>
<tr>
<td>DSA2/HELP1 (Non-medical helpers allowance)</td>
<td>If CDLP1 = “greater period of time”, you will need to calculate the amount for the academic year. This should be done by calculating, firstly, the number of weeks between CDLP2 and CDLP3. You should then calculate the amount for 39 weeks. (e.g. if the number of weeks between CDLP2 and CDLP3=52, you would then do 39/52 x amount.)</td>
<td>CRSOTH5/ CRSAM5 (Employer contribution towards tuition fees for part time students)</td>
</tr>
<tr>
<td>DSA2/GENP1 (General allowance)</td>
<td></td>
<td>CRSOU5/ CRSOUAM5 (Employer contribution towards tuition fees for OUT students)</td>
</tr>
<tr>
<td>DSA2/DTRP1 (DSA extra travel allowance)</td>
<td></td>
<td>EMPSUP1/EMPSUP2 (financial support from employers, not for tuition fees)</td>
</tr>
<tr>
<td>Support from student’s university or college [XUNICL]</td>
<td>DTFWHO7/ DTFWHAM7 (University/College contribution towards tuition fees for full time students)</td>
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<td>-----------------------------------------------------</td>
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<tr>
<td></td>
<td>CRSOTH6/ CRSAMM6 (University/College contribution towards tuition fees for part time students)</td>
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<tr>
<td></td>
<td>CRSOU6/ CRSOUAM6 (University/College contribution towards tuition fees for OU students)</td>
<td></td>
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<tr>
<td></td>
<td>SCHOLE/ UCSCOL1E/ UCSCOLAME (University/college scholarship or bursary, England) [XSCOL]</td>
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<tr>
<td></td>
<td>(Where amounts reported by term, please multiply by 3 for annual figure.)</td>
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</tr>
<tr>
<td></td>
<td>SCHOLW/ UCSCOL1W/ UCSCOLAMW (University/ college scholarship or bursary, Wales – including Welsh Bursary Scheme) [XWBRS]</td>
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<tr>
<td></td>
<td>(Where amounts reported by term, please multiply by 3 for annual figure.)</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Code</td>
<td>Notes</td>
</tr>
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<td>-------------------------------------------------</td>
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<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Other (e.g. EU program/ Care Leavers, Travel)</td>
<td>XOTHSTUD</td>
<td></td>
</tr>
<tr>
<td>DTFWHO9/ DTFWHAM9 (Contribution from someone</td>
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<tr>
<td>else towards tuition fees for full time students)</td>
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<tr>
<td>CRSOTH7/ CRSAM7 (Contribution from someone</td>
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<tr>
<td>else towards tuition fees for part time students)</td>
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<tr>
<td>CRSOU7/ CRSOUAM7 (Contribution from someone</td>
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<tr>
<td>else towards tuition fees for OU students)</td>
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<tr>
<td>TRAV/TRAVP1/TRAV2/TRAVP2 (extra travel costs)</td>
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<tr>
<td>Where amounts reported</td>
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<tr>
<td>- by term, please multiply by 3 for annual</td>
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<tr>
<td>figure;</td>
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<tr>
<td>- by month, please multiply by 12, divide by</td>
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</tr>
<tr>
<td>52 and multiply by 39 for annual figure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- by week, please multiply by TRAVp2 for annual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>figure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ERAS/ERASAM (Socrates-Erasmus funding)</td>
<td></td>
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</tr>
<tr>
<td>OTHFUND/OTHAM (Any “other” grants/ awards/</td>
<td></td>
<td></td>
</tr>
<tr>
<td>scholarships/ allowances)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paid work [XWORKXV¹]</td>
<td>Earning from paid</td>
<td></td>
</tr>
<tr>
<td>work during the academic year</td>
<td>CASH/WRK/JSTDAT/ JFN/ JFNDAT/ JOBHR1/ JOBHRT/ JOBAMT/ JOBPT (Earnings from job generally or in term times - if started BEFORE)</td>
<td></td>
</tr>
</tbody>
</table>

¹ XWORKXV refers to work excluding summer vacation and was included in XINCOME.
<table>
<thead>
<tr>
<th>[XPJOB]</th>
<th>beginning of academic year and likely to continue until AFTER the end of the academic year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>JSTDAT/ JFN/ JFNDAT/ JOBHR1/ JOBHRV/ JOBAMV/ JOBPV (Earnings from job in holidays (not summer vacation - if started BEFORE beginning of academic year and likely to continue until AFTER the end of the academic year)</td>
<td></td>
</tr>
<tr>
<td>You will need to calculate earnings for a 39 week academic year. This includes 32 weeks of term time and 7 weeks of holidays.</td>
<td></td>
</tr>
</tbody>
</table>
| Other work [XOTHJXV] | JSTDAT/ JFN/ JFNDAT/ JOBHR1/ JOBHR1/ JOBAMT/ JOBAMT/ JOBPT (Earnings from job generally or in term times - if started AFTER beginning of academic year and/or likely to end BEFORE the end of the academic year)
JSTDAT/ JFN/ JFNDAT/ JOBHR1/ JOBHRV/ JOBAMV/ JOBAMV/ JOBPV (Earnings from job in holidays - not summer vacation - if started AFTER beginning of academic year and/or likely to end BEFORE the end of the academic year)
JOBFUT/ JOBFUTAM/ JOBFUTAb (Earnings from “other” jobs in the academic year)
You will need to calculate earnings for a 39 week academic year. This includes 32 weeks of term time and 7 weeks of holidays. |
| | [XSUMMER] VACS, VACSWK, VACSHRP, VACSHb, VACSPER, VACSPERb (Earnings from summer vacation work) |
| Social security benefits [XBENS] Social security benefits [XBENS] | BEN1/ BEN2/ BENAM (amount of benefits received) |
| Other income [XOTHINC] Miscellaneous [XOTHINC] | MAINT/MAINT2X (Maintenance received from former partner)
- Where amount given by month, multiply by 12, divide by 52 and multiply by 39 for annual figure |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th>HOUS6/HOUS7 (Rent received from lodger/sharers)</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>SELLBK (Sale of various items)</td>
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<tr>
<td></td>
<td></td>
<td>GITFOTH (money from any other sources such as from friends, pensions, shares)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>XSPEND</th>
<th>Living [XLIVING]</th>
<th>Food and non-alcoholic drinks [XFOOD]</th>
<th>N/a</th>
<th>26. Food – meals/snacks from cafes, pubs, restaurants, shops etc, outside the home [XDYFDA12]</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>[XLIVING2]</td>
<td>[XFOOD]</td>
<td>+</td>
<td>28. Non-alcoholic drinks outside the home [XDYFDC12]</td>
</tr>
<tr>
<td>+</td>
<td>[XLIVING2]</td>
<td>[XFOOD2]</td>
<td></td>
<td>29. Food and drink to consume at home [XDYHOUA12]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>[XFOOD2]</td>
<td></td>
<td>53. Other food and drink (non-alcoholic) [XDYFDD12]</td>
</tr>
<tr>
<td>Personal</td>
<td>TELC (Landline telephone costs, broadband, wi fi, television package)</td>
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<tr>
<td></td>
<td>MOBC (mobile phone costs)</td>
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<td></td>
<td>TVLIC (TV licence)</td>
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<tr>
<td></td>
<td>SPEN2 (Spending on audiovisual equipment)</td>
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<td></td>
<td>SPEN2B (Spending on mobile phone handsets, games consoles etc.)</td>
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<td></td>
<td>15. Cigarettes &amp; tobacco</td>
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<td>13. Clothes, shoes, accessories</td>
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<td>14. CDs, music, DVDs videos etc</td>
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<td>16. Newspapers, magazines, books, stationery etc</td>
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<td>17. Gifts &amp; cards</td>
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<td>18. Prescriptions &amp; other medicines</td>
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<td></td>
<td>19. Toiletries</td>
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<td></td>
<td>XX. Beauty treatments</td>
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<tr>
<td></td>
<td>52. Other personal expenditure not covered in the qre/diary</td>
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<tr>
<td>Entertainment</td>
<td>SPEN7 (Spending on sporting activities, hobbies etc over £50)</td>
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<td></td>
<td>7. Cinema, theatre &amp; concerts</td>
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<td>8. Entry to nightclubs, discos etc</td>
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<td></td>
<td>9. Sports, hobbies, clubs &amp;</td>
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<td></td>
<td>societies [XDYLIFC12]</td>
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<td>10. Religious activities [XDYLIFD12]</td>
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<td>11. National lottery or betting [XDYLIFE12]</td>
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<td>51. Other entertainment [XDYLIFX12]</td>
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<td>27. Alcohol consumed outside the home [XDYFDB12]</td>
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<td></td>
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<td></td>
<td>30. Alcohol consumed inside the home [XDYHOUB12]</td>
<td></td>
</tr>
<tr>
<td>Household goods [XHHGOODT]</td>
<td>SPEN3 (Spending on furniture or household appliances worth more than £50)</td>
<td>31. Household goods, cleaning, pet food etc [XDYHOUC12]</td>
<td></td>
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<td></td>
<td>32. Servicing or repairs to hh equipment [XDYHOUD12]</td>
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<td></td>
<td>33. Laundry or dry cleaning [XDYHOUE12]</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>34. Payments into a kitty/common pool [XDYHOUF12]</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>54. Other household items not covered in qre/diary [XDYHOUX12]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel [XLIVTRAT]</td>
<td>Vcost (vehicle maintenance)</td>
<td>2. Fares paid for leisure travel [XDYTRB12]</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FAMPAM (travel between family home and uni/college)</td>
<td>6. Parking paid for leisure travel [XDYTRF12]</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>HOLS1 (Cost of holidays)</td>
<td>4. Petrol for a car van, motorbike or scooter [XDYPETR12]</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SPEN1 (Spending on certain items relating to travel)</td>
<td>50. Other travel here [XDYTRX12]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other living costs [XOTHLIVT]</td>
<td></td>
<td>72. Other costs not already covered in the main qre or diary [XDYX212]</td>
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<tr>
<td></td>
<td>MAINT1/MAINT2 (maintenance for former partner/children)</td>
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<tr>
<td></td>
<td>(Use academic year here, although question wording just says “year” – so:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Housing [XHOUSE] | Rent [XRENT] | HOUS4/HOUS5 (mortgage)  
| | | HOUS8 (rent cost per month)  
| | | HOUS8/HOUS10/HOUS11 cost of rent during Christmas and Easter vacation if different from term time  
| | | Please calculate amount for academic year – i.e. 39 weeks. Again, please assume vacations last for 7 weeks.  
| | | e.g. if HOUS8=£100 and HOUS10=different and HOUS11=£50, the procedure would be as follows:  
| | | Term time amount: ((£100 x 12 / 52) x 32) plus Vacation time amount: ((£50 x 12 / 52) x 7)  
| Retainer [XRETAINE] | HOUSP/HOUSQ (retainer in summer vacation)  
| | If answer given by week, please multiply by 13.  

- where amount given by year, do amount/52 x 39 to get total.  
- Where amount given by month, multiply by 12, divide by 52 and multiply by 39 for annual figure
<table>
<thead>
<tr>
<th>Category</th>
<th>Subcategory</th>
<th>Description</th>
</tr>
</thead>
</table>
| Other (e.g. household bills) | XOTHHOUS | CT1A/CTAM (Council tax payments)  
(Need to check calculation here – sorry!)  
ELEC/ ELEC2/ ELEC3/ GAS/ GAS2/ GAS3/ WAT/ WAT2/ WAT3 (Household bill payments)  
Need totals for academic year, i.e. 39 weeks.  
- If reported monthly, need to x 52 / 12 x 39.  
- If reported 1/4ly, need to x 4 / 12 x 39  
SPEN6 (Spending on insuring possessions, including buildings/ contents insurance) |
| Participation | XPARTIC | Books and equipment | XBOOKS |
|           |           | BOOK1 (Books, workbooks, papers, pamphlets)  
PHOT1/ PHOT2 (Photocopying, stationery etc)  
Need academic year totals:  
- by term, please multiply by 3 for annual figure;  
- by month, please multiply by 12, divide by 52 and multiply by 39 for annual figure  
- by week, please multiply by 39 for annual figure  
COMPEE/ COMPF/COMPG (Computer costs)  
EQUIP/EQUIP1 (Special equipment for the course) |
| Travel relating to work, study and childcare | XPARTRAV | TRIP5 (course/study related trips) |
|           |           | 1. Fares paid between college or work and home [XDYTRA12]  
3. Fares paid to/from school/nursery [XDYTRC12] |
<table>
<thead>
<tr>
<th>Cost of fees [XFEECO]</th>
<th>CRSFEEF/ CRSAMT (standard fee or other fee)</th>
</tr>
</thead>
</table>

5. Parking paid for college or work [XYTRE12]
<table>
<thead>
<tr>
<th>Children [XCHILD]</th>
<th>All spending on children [XCHILD]</th>
<th>CH1 to CH9 AND CH12 TO CH14 (spending on children)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NB. We’ll need academic year totals for all of these.</td>
<td></td>
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<tr>
<td>- CH1 = reported monthly, so please multiply by 12, divide by 52 and multiply by 39 for annual figure</td>
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<tr>
<td>- CH2 = reported by academic year already</td>
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<tr>
<td>- CH3 = reported monthly, so please multiply by 12, divide by 52 and multiply by 39 for annual figure</td>
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<tr>
<td>- CH4 = reported yearly, so please divide by 52, and multiply by 39 for annual figure</td>
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<tr>
<td>- CH5 - CH6 = reported monthly, so please multiply by 12, divide by 52 and multiply by 39 for annual figure</td>
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<tr>
<td>- CH7 = reported yearly, so please divide by 52, and multiply by 39 for annual figure</td>
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<tr>
<td>- CH8 = reported monthly, so please multiply by 12, divide by 52 and multiply by 39 for annual academic figure</td>
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<tr>
<td>- CH9 = reported weekly, so please multiply by 39 for annual figure</td>
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<tr>
<td>- CH12-13 = reported yearly, so please divide by 52, and multiply by 39 for annual academic figure</td>
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<tr>
<td>- CH14 = reported by academic year already</td>
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</tbody>
</table>

CHC1/ CHC1B/ CHC2/ CHC2B/ CHC3/ CHC3B (childcare costs for nursery/nannies/babysitters/after school clubs etc)
Need academic year figures:
- Where reported monthly, please multiply by 12, divide by 52 and multiply by 39 for annual academic figure
- Where reported weekly, please multiply by 39

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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>COMPAY repayments paid in academic year</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CCACSAM (credit card balance at beginning of year) CCENDAM (credit card balances at the end of the year) (Will need to subtract start of year amount from end of year amount)</td>
</tr>
<tr>
<td>Overdraft [XOD]</td>
<td></td>
<td></td>
<td>ODB/ ODE (overdraft at the beginning and end of the year) (Will need to subtract start of year amount ODB from end of year amount ODE)</td>
</tr>
<tr>
<td>Arrears [XARR]</td>
<td></td>
<td></td>
<td>ARRFAM (arrears at the end of the year)</td>
</tr>
<tr>
<td>[XCDLDEBT] Career Development Loan</td>
<td>CDLAM/CDLP1/CDLP2/CDLP3 (Career Development Loan)</td>
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<tr>
<td>See above.</td>
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</tr>
<tr>
<td>[XSTUDEBT] Outstanding Student Loan debt</td>
<td>FULLLOAN (Whether full time student has received loan to cover the full amount of fees – i.e. £3,375)</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>FLOAN / FLOANAMT (Whether full time student has received any loan for fees and amount received)</td>
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<tr>
<td></td>
<td>SLOAN/LAM1/LAM2 (Basic Student Loan for maintenance)</td>
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<tr>
<td></td>
<td>LWEEKS1/LWEEKS2/LW2/LWEEKS4 (Extra weeks maintenance allowances)</td>
<td></td>
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<tr>
<td></td>
<td>OLDLAM1-OLDLAM2 (Amount owing on previous student loans)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[XACCDEBT] (if not to be repaid)</td>
<td>ACC/ACC1 /ACC3 (Access to Learning Fund in England)</td>
<td></td>
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<tr>
<td></td>
<td>CFC/WACC1 /WACC3 (Financial Contingency Funds in Wales)</td>
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<td></td>
<td>To compute if Acc3 or Wacc3=&quot;need to pay the money back&quot;</td>
<td></td>
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</tr>
<tr>
<td>Total savings (XSAVE)^1</td>
<td>Savings (XSAVE)</td>
<td>Savings (XSAVE)</td>
<td>SAVEE (savings at the end of the year)</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------</td>
<td>------------------</td>
<td>----------------------------------------</td>
</tr>
</tbody>
</table>

Note: value for \(XSAVE\) was adjusted for those who were married or had joint financial responsibility or a joint bank account.

---

^1 Other derived variables relating to savings include XSAVEL (savings at the end of the last academic year) and XSAVEB (savings at the start of the academic year).
### Appendix 5 – Variable List

<table>
<thead>
<tr>
<th>Variable Name</th>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administrative variables</strong></td>
<td></td>
</tr>
<tr>
<td>SCREENED</td>
<td>Screened out</td>
</tr>
<tr>
<td>SERIAL</td>
<td>Serial Number</td>
</tr>
<tr>
<td>ckl</td>
<td>Check Letter</td>
</tr>
<tr>
<td><strong>Questionnaire variables</strong></td>
<td></td>
</tr>
<tr>
<td>EngWales</td>
<td>location of the institution</td>
</tr>
<tr>
<td>OU</td>
<td>Whether Open university student?</td>
</tr>
<tr>
<td>UNI</td>
<td>Whether registered and attending courses at institution</td>
</tr>
<tr>
<td>UNI2</td>
<td>Whether registered at institution even though may be attending courses elsewhere</td>
</tr>
<tr>
<td>OUCOU</td>
<td>Whether registered and still studying for a module/qualification with the Open University</td>
</tr>
<tr>
<td>FTPT</td>
<td>Course full-time or part-time</td>
</tr>
<tr>
<td>PT2</td>
<td>Whether course lasts at least one academic year</td>
</tr>
<tr>
<td>PTWHY1</td>
<td>Whether chose part-time study as 'Only option available / no suitable full-time course available'</td>
</tr>
<tr>
<td>PTWHY2</td>
<td>Whether chose part-time study as 'Had a full time job / wanted to continue working'</td>
</tr>
<tr>
<td>PTWHY3</td>
<td>Whether chose part-time study as 'Have family commitments / caring for household member'</td>
</tr>
<tr>
<td>PTWHY4</td>
<td>Whether chose part-time study as 'Had to study part-time to avoid reductions in social security benefits/allowances'</td>
</tr>
<tr>
<td>PTWHY5</td>
<td>Whether chose part-time study as 'Could not afford to study full time'</td>
</tr>
<tr>
<td>PTWHY6</td>
<td>Whether chose part-time study 'Because of the new student funding regime'</td>
</tr>
<tr>
<td>PTWHY7</td>
<td>Whether chose part-time study as 'Did not have entry qualifications to study full-time course'</td>
</tr>
<tr>
<td>PTWHY95</td>
<td>Whether chose part-time study for 'Other specific reason'</td>
</tr>
<tr>
<td>PTWHY96</td>
<td>Whether chose part-time study for 'Other irrelevant reason'</td>
</tr>
<tr>
<td>PTWHY97</td>
<td>Whether chose part-time study for 'Other not codeable reason'</td>
</tr>
<tr>
<td>PTWHY98</td>
<td>Why chose part-time study - Don't Know</td>
</tr>
<tr>
<td>PTWHY99</td>
<td>Why chose part-time study - Refusal</td>
</tr>
<tr>
<td>YRTOTAL</td>
<td>length of current course/programme.</td>
</tr>
<tr>
<td>YRTOTALO</td>
<td>Years planned to complete studies at Open University</td>
</tr>
<tr>
<td>YRNOWC</td>
<td>Year of course</td>
</tr>
<tr>
<td>YRNOWO</td>
<td>Years studied at Open University</td>
</tr>
<tr>
<td>SAND</td>
<td>Whether a sandwich course</td>
</tr>
<tr>
<td>SANDJOB</td>
<td>Whether earned/going to earn money from a paid placement on sandwich course</td>
</tr>
<tr>
<td>OUCRED</td>
<td>Whether modules studying towards are at least 30 credits per year</td>
</tr>
<tr>
<td>UKRES</td>
<td>Whether lived in United Kingdom for the three years before course</td>
</tr>
<tr>
<td>UKDOMP</td>
<td>United Kingdom nation lived in before starting course.</td>
</tr>
<tr>
<td>LOND</td>
<td>Whether lives London</td>
</tr>
<tr>
<td>QUAL</td>
<td>Qualification studying for</td>
</tr>
<tr>
<td>NHS1</td>
<td>Whether studying on an NHS funded health professional course</td>
</tr>
<tr>
<td>NHSBURS</td>
<td>Whether received/expect to receive money as an NHS Bursary</td>
</tr>
<tr>
<td>ABROAD1</td>
<td>Whether have to attend an education institution outside UK as part of course</td>
</tr>
<tr>
<td>ABROAD2</td>
<td>Whether have to attend an education institution outside the UK for at least eight weeks continuously</td>
</tr>
<tr>
<td>SLDEBT</td>
<td>Whether studied on another higher education course/qualification before current course</td>
</tr>
<tr>
<td>SLDEBT2</td>
<td>Highest qualification at the start of current course</td>
</tr>
<tr>
<td>AGE2</td>
<td>Whether student is 24 years old or under, or 25 years or over?</td>
</tr>
<tr>
<td>MARITAL</td>
<td>Marital status</td>
</tr>
</tbody>
</table>
FINJ1: Whether share joint financial responsibility with partner, for housing costs or other essential expenditure
SUPFIN: Whether support self financially three years prior to the start of the first academic year of your course
DEPAD: Whether student lives with any adults who depend on them financially
CHILDHH: Whether student has any children living with them
CHNO: How many children student has living with them
CHAGE01: Age of first child living with student
CHAGE02: Age of second child living with student
CHAGE03: Age of third child living with student
CHAGE04: Age of fourth child living with student
CHAGE05: Age of fifth child living with student
CHABS: Whether student has any children not living with them
PARTCH1: Whether spouse/partner have any children who live in household
PCHNO: How many children spouse has living with student
PCHAGE01: Age of partner's first child living with student
PCHAGE02: Age of partner's second child living with student
PCHAGE03: Age of partner's third child living with student
PARTCH2: Whether spouse/partner has any children who do not live in household
CRSFEEF: Cost of tuition fees for course this academic year (full-time courses)
CRSAMT: Cost of tuition fees for course this academic year (part-time courses)
FLOAN: Whether used/expect to use any tuition fee loan to cover the cost of tuition fees
FLOANANY: Whether used/expect to use any tuition fee loan to cover the cost of tuition fees
FLOANAMT: How much tuition fee loan used for this academic year
DTFWHO1: Who contributed towards cost of tuition fees - Welsh Government tuition fee grant
DTFWHO2: Who contributed towards cost of tuition fees - Student
DTFWHO3: Who contributed towards cost of tuition fees - Parent/Step-parent
DTFWHO4: Who contributed towards cost of tuition fees - Spouse or partner
DTFWHO5: Who contributed towards cost of tuition fees - Another relative
DTFWHO6: Who contributed towards cost of tuition fees - Employer
DTFWHO7: Who contributed towards cost of tuition fees - University or college studying at
DTFWHO8: Who contributed towards cost of tuition fees - Fees covered by NHS bursary
DTFWHO9: Who contributed towards cost of tuition fees - Someone else or another organisation
dvDTFWHO: Whether receives NHS bursary (Derived)
DTFWHAM1: How much tuition fee paid by student
DTFWHAM2: How much tuition fee paid by parent/step-parent
DTFWHAM3: How much tuition fee paid by spouse/partner
DTFWHAM4: How much tuition fee paid by another relative
DTFWHAM5: How much tuition fee paid by employer
DTFWHAM6: How much tuition fee paid by university/college
DTFWHAM7: How much tuition fee paid by someone else/another organisation
CRSGRA: Whether received/expect to receive a Fee Grant from the Student Loans Company
CRSAM: How much fee grant received/expected to receive from the Student Loans Company
CRSOTH1: Whether student paid rest of tuition fees
CRSOTH2: Whether parents/step parents paid rest of tuition fees
CRSOTH3: Whether spouse/partner paid rest of tuition fees
CRSOTH4: Whether another relative paid rest of tuition fees
CRSOTH5: Whether employer paid rest of tuition fees
CRSOTH6: Whether university/college paid rest of tuition fees
CRSOTH7: Whether someone else/another organisation paid rest of tuition fees
Allowance

ADG  Whether received/expected to receive any money as part of an Adult Dependants Grant

DSA1 Whether received/expected to receive money from the Disabled Students Allowance
Whether received/expected to receive a general disable students' allowance as part of Disabled Students Allowance

DSA21 Whether received/expected to receive specialist equipment allowance as part of Disabled Students Allowance

DSA22 Whether received/expected to receive a non-medical helpers' allowance as part of Disabled Students Allowance

DSA23 Whether received/expected to receive extra travel costs as part of Disabled Students Allowance

DSA24 Whether received/expected to receive 'other' allowance as part of Disabled Students Allowance

DSA25 Whether received/expected to receive 'don't know' as part of Disabled Students Allowance

DSA26 Whether received/expected to receive any money through a Training Bursary related to your teacher training course

EITT Whether received/expected to receive a Course Grant for ITT Students, related to teacher training course

WITT1 Whether received/expected to receive a the Teach Training Recruitment Scheme in Wales, related to teacher training course this academic year.

WITT2 Whether received/expected to receive the Welsh Medium Supplement in Wales, related to teacher training course this academic year.

WITT3 Whether received/expected to receive the Teaching Grant in Wales, related to teacher training course this academic year.

WITT4 Whether received/expected to receive money from 'none of the above sources', related to teacher training course this academic year.

WITT5 Whether received/expected to receive money from college/university through Access to Learning Funds

ACC Whether have to pay back Access to Learning Fund

ACC3 Whether received/expected to receive money from college/university through the Financial Contingency Funds scheme

CFC Whether have to pay back Financial Contingency Funds scheme

WACC Whether received/expected to receive any money as part of the Socrates-Erasmus exchange programme

ERAS Whether received/expected to receive any money towards extra travel costs as a result of the course

TRAV How many weeks/months extra travel costs received per year

TRAVP2 Whether received/expected to receive any money from any other grants, awards or scholarships

OTHFUND How much money received/expected to receive in this academic year from other grants or allowances

OTHAM Whether student funding and support available affected decision about study

DEC Whether support available affected decision to study full-time or part-time

DECWH1 Whether support available affected decision to study at a nearby university so could live with family

DECWH2 Whether support available affected decision to study in England or Wales

DECWH3 Whether support available affected decision to study in Wales

DECWH4 Whether support available affected decision to study in London or not

DECWH5 Whether support available affected decision about what course to take

DECWH6 Whether support available affected decision about what institution to attend

DECWH7
DECWH9: Whether support available affected decision to study - wouldn't have studied without funding
DECWH10: Whether support available affected decision to study - none of these
DECWH95: Whether support available affected decision to study: Other specific answer
DECWH96: Whether support available affected decision to study: Other irrelevant answer
DECWH97: Whether support available affected decision to study: Other not codeable answer
DECWH98: Whether support available affected decision to study: Don't know
DECWH99: Whether support available affected decision to study: Refusal

OLDLOAN: Whether had any loans outstanding from the Student Loans Company at the start of this academic year
OldLAm1: How much borrowed from the Student Loans Company before start of this academic year
OldLAm2: How much loans paid back from Student Loans Company before start of this academic year
CASH: Whether received any earnings from paid work since the start of the year
WRK: How many jobs/different types of paid work earned from
JSTDAT: When started work
JFN: Whether expect this work to carry on at least until the end of the academic year
JFNDAT: When did the employment end/expect work to end?
JOBHR1: Whether work same number of hours in term time and vacations or a different number of hours
JOBHRT: Numbers of hours do job each week
JOBHRV: Number of hours do job each week in vacations
JSTDAT2: When started work
JFN2: Whether expect this work to carry on at least until the end of the academic year
JFNDAT2: When did the employment end/expect work to end?
JOBHR2: Whether work same number of hours in term time and vacations or a different number of hours
JOBHRT2: Numbers of hours do job each week
JOBHRV2: Number of hours do job each week in vacations
JSTDAT3: When started work
JFN3: Whether expect this work to carry on at least until the end of the academic year
JFNDAT3: When did the employment end/expect to end?
JOBHR3: Whether work same number of hours in term time and vacations or a different number of hours
JOBHRT3: Numbers of hours do job each week
JOBHRV3: Number of hours do job each week in vacations
JSTDAT4: When started work
JFN4: Whether expect this work to carry on at least until the end of the academic year
JFNDAT4: When did the employment end/expect work to end?
JOBHR4: Whether work same number of hours in term time and vacations or a different number of hours
JOBHRT4: Numbers of hours do job each week
JOBHRV4: Number of hours do job each week in vacations
JSTDAT5: When started work
JFN5: Whether expect this work to carry on at least until the end of the academic year
JFNDAT5: When did the employment end/expect work to end?
JOBHR5: Whether work same number of hours in term time and vacations or a different number of hours
JOBHRT5: Numbers of hours do job each week
JOBHRV5: Number of hours do job each week in vacations
JSTDAT6: When started work
JFN6: Whether expect this work to carry on at least until the end of the academic year
JFNDAT6: When did the employment end/expect work to end?
JOBHR6: Whether work same number of hours in term time and vacations or a different number of hours
JOBHRT6  Numbers of hours do job each week
JOBHRV6  Number of hours do job each week in vacations
JSTDAT7  When started work
JFN7    Whether expect this work to carry on at least until the end of the academic year
JFNDAT7  When did the employment end/expect work to end?
JOBHR7  Numbers of hours do job each week
JOBHRV7  Number of hours do job each week in vacations
JSTDAT8  When started work
JFN8    Whether expect this work to carry on at least until the end of the academic year
JFNDAT8  When did the employment end/expect work to end?
JOBHR8  Numbers of hours do job each week
JOBHRV8  Number of hours do job each week in vacations
EMPSUP1  Whether employer given any extra financial support to help with the cost of studies
EMPSUP2  How much extra financial support provided by employer
VACS    Whether did paid work last summer vacation
VACSWK  How many weeks worked over summer vacation
VACSHRP  How many hours worked over summer vacation by period
VACSHb  How many works hours worked over summer vacation
JOBFUT  Whether expected to have any other paid jobs between now and the end of the academic year
PARACT  Spouse/partners main activity
PARNET2  Whether total annual income band is 'gross' or 'net'
MAINT1  Whether student makes regular payments for maintenance for a former partner not living with them
MAINT2  Amount of student regular payments for maintenance for a former partner not living with them 'weekly', 'monthly', or 'over a year'
Maint2b  Amount of student regular payments for maintenance for a former partner not living with them
MonGif  Questions about gifts received from parents or other relatives.
PARENTS1  How much money received/expected to receive from parents or other relatives to pay for your living costs and bills
PARENTS2  How much money received/expected to receive from parents or other relatives to pay for anything else
PARENTS3  What is the value of gifts received/expected to receive from parents or other relatives
SAVEB  Total level of savings at beginning of academic year.
SAVEE  Expected level of savings at end of academic year
MAINT  Whether receiving maintenance payments from a former spouse or partner
GITFOTH  How much money received/expected to receive from other sources
SELLBK  How much money made by selling possessions
ODB    How much overdrawn at beginning of academic year
ODE    How much expected to be overdrawn at the end of the academic year
COM    Whether has any outstanding loans
COMPAY  How much expected to pay in repayments for outstanding loans this academic year
COMDT  How much owed after repayment made on outstanding loans at the end of this academic year
CCACSAM  How much outstanding on credit and store cards at the start of this academic year
CCENDAM  How much expected outstanding on credit and store cards at the end of this academic year
Whether expected to be behind on rent, mortgage repayments or council tax at end of the academic year
Are you behind in any of the following bills at the end of the academic year?

ARRF1  Whether expected to be behind on gas, electricity or water at the end of the academic year
ARRF2  Whether expected to be behind on Credit Card payments at the end of the academic year
ARRF3  Whether expected to be behind on Mail order catalogue payments at the end of the academic year
ARRF4  Whether expected to be behind on Telephone or TV licence at the end of the academic year
ARRF5  Whether expected to be behind on Childcare payments, child support or maintenance at the end of the academic year
ARRF6  Whether expected to be behind on Road Tax at the end of the academic year
ARRF7  Whether expected to be behind on Other items at the end of the academic year
ARRF8  Whether expected to be behind on 'None of these' at the end of the academic year
ARRFAM  How much in total expected to be in arrears with these bills by the end of term

HOUS  Where student lives
HOUS4  Whether buying property on mortgage or own property
HOUS5  Monthly mortgage repayments on property
HOUS6  Whether get rent from lodgers/sharers
HOUS7  Rent received from lodgers/sharers
HOUS8  Cost of rent per month
HOUS10  Whether pay same amount of rent during term time and Christmas and Easter holidays
HOUS11  Cost of rent per month during the Christmas and Easter holidays
HOUSp  Whether had to pay a retainer on accommodation not living in last summer vacation
HOUSq  How much did retainer cost by period
HOUSqb  How much did retainer cost
CT1a  Whether paid/expected to pay any council tax during the course of the academic year
CTAM  How much paid towards council tax last month
ELEC  How much paid for last electricity bill
ELEC2  How long last electricity payment covered by period
ELEC3  How long last electricity payment covered
GAS  How much paid for last gas bill
GAS2  How long last gas payment covered by period
GAS3  How long last electricity payment covered
WAT  How much paid for last water bill
WAT2  How long last water bill covered by period
WAT3  How long last water payment covered
MOBC  How much spent last month on mobile phone contract
TELC  How much spent last month on landline telephone, broadband or Wi-Fi connection and any television packages
TVLIC  How much expected to spend this academic year on travel between term-time accommodation and parents/family home
FAMPAM  How much expected to spend this academic year on travel between term-time accommodation and parents/family home
TRCOST  How much spent in average week on public transport
PETR  How much spent on average week on petrol costs and parking
VCOST  How much spent on motor vehicle tax, insurance, repairs and maintenance over the year
CH10  How much spent last week on travel to and from school or nursery
TRIP5  How much spent this academic year on any trips associated with course work
HOLS1  How much expected to spend this academic year on holidays
BOOK1  How much expected to spend on new or second-hand books, workbooks, papers or pamphlets needed for course work
PHOT1  How much expected to spend this term on photocopying, print, stationary and computer equipment by period
PHOT2  How much expected to spend this term on photocopying, print, stationary and computer equipment by period
equipment
Whether bought/expected to buy a computer to use on course-related work during the current academic year
COMPe
COMPf
How spent on computer/computer equipment
COMPg
How much expected to spend on computer
EQUIP
Whether any special equipment, clothing or materials recommended for course
EQUIP2
How much expected to spend on special equipment, clothing or materials needed for course
council
Council tax
electric
Electricity bills
xgas
Gas bills
water
Water bills
CH
Questions on money spent on children.
CH1
How much spent last month childrens toys books and presents
How much spent childrens Christmas, other religious festivals and birthday presents over the academic year
CH2
How much spent last month on childrens clothes and shoes
CH3
How spent over the year on school uniforms
CH5
How much spent last month on childrens entertainment and hobbies
CH6
How much spent last month on nappies or children`s toiletries
CH7
How spent over the year on baby equipment
CH8
How much pocket money/allowances given to children over the last month
CH9
How much spent last week on school lunches, packed lunches and school milk?
CH12
How much spent over the year on school uniforms
CH13
How much spent over the year on school fees or a school fund
CH14
How much spent this academic year on Partners children that don't live with student
CHC_1
Whether use play school/nursery/ crèche/registered childminder
CHC_2
Whether use baby sitter/au pair/nanny
CHC_3
Whether use after school care or after school clubs
CHC_4
Whether use 'none of these' childcare options
CHC1A
How much spent on play school/nursery/crèche fees/registered childminder by period
CHC1B
How much spent on play school/nursery/crèche fees/registered childminder
CHC2A
How much spent on baby sitters au pairs/nannies by period
CHC2B
How much spent on baby sitters au pairs/nannies
CHC3A
How much spent on after school care/after school clubs by period
CHC3B
How much spent on after school care/after school clubs
SPEN1
Expected spend on transport/travel over the academic year
SPEN2
Expected spend on audiovisual equipment over the academic year
SPEN2B
Expected spend on mobile phones handsets, games consoles, cameras or computer over academic year
SPEN3
Expected spend on furniture, household appliances and other household goods over academic year
SPEN4
Expected spend on glasses, contact lenses and dental/medical treatments over academic year
SPEN5
Expected spend on clothes, shoes and accessories over the academic year
SPEN6
Expected spend on insuring your possessions, including buildings/ household over academic year
SPEN7
Expected spend on items worth over £50 over academic year
Diar3
Spend in the average week on CDs, downloaded music and DVDs
Diar4
Spend in the average week on newspapers, magazines, books, stationery and postage
Diar5
Spend in the average week on toiletries and medicine
<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diar6</td>
<td>Spend in the average week on cigarettes, tobacco and alcohol consumed outside the home.</td>
</tr>
<tr>
<td>Diar7</td>
<td>Spend in the average week on meals and snacks from cafes, pubs, etc.</td>
</tr>
<tr>
<td>Diar1</td>
<td>Spend on entertainment.</td>
</tr>
<tr>
<td>Diar8</td>
<td>Spend in the average week on food and drink bought to consume at home.</td>
</tr>
<tr>
<td>Diar9</td>
<td>Spend in the average week on household goods.</td>
</tr>
<tr>
<td>QUAL1</td>
<td>Type of school attended.</td>
</tr>
<tr>
<td>QUAL2</td>
<td>Highest qualification before studying.</td>
</tr>
<tr>
<td>HEPAR1</td>
<td>Whether parent stayed on at school after the age of 16.</td>
</tr>
<tr>
<td>HEPAR2</td>
<td>Whether parent attended a university/college of higher education.</td>
</tr>
<tr>
<td>Awork1</td>
<td>Whether been in paid work before starting this college course.</td>
</tr>
<tr>
<td>Awork6</td>
<td>Whether employee/self-employed in paid work before starting college course.</td>
</tr>
<tr>
<td>Awork7</td>
<td>Whether working full-time/part-time in paid work before starting course.</td>
</tr>
<tr>
<td>Awork8</td>
<td>Whether had responsibility for supervising the work of other employees in paid work before starting course.</td>
</tr>
<tr>
<td>Awork10</td>
<td>How many employees at place where worked before starting course.</td>
</tr>
<tr>
<td>AWork11</td>
<td>Whether worked on own or had employees where worked before starting course.</td>
</tr>
<tr>
<td>AWork12</td>
<td>How many people student employed at the place where worked before starting course.</td>
</tr>
<tr>
<td>Bwork1</td>
<td>Whether main income household earner was in paid work before started current course.</td>
</tr>
<tr>
<td>Bwork6</td>
<td>Whether main income household earner prior to course was an employee/self-employed.</td>
</tr>
<tr>
<td>Bwork7</td>
<td>Whether main income household earner prior to course was working full-time/part-time.</td>
</tr>
<tr>
<td>Bwork8</td>
<td>Whether main income household earner prior to course had responsibility for supervising other employees.</td>
</tr>
<tr>
<td>Bwork10</td>
<td>How many employees were there at the place where main income householder worked prior to course.</td>
</tr>
<tr>
<td>BWork11</td>
<td>Whether main income household earner prior to course worked on his own/had any employees.</td>
</tr>
<tr>
<td>BWork12</td>
<td>How many people main income household earner prior to course employed at the place where he/she worked.</td>
</tr>
<tr>
<td>Cwork1b</td>
<td>Whether had been in paid work before starting this college course.</td>
</tr>
<tr>
<td>Cwork6</td>
<td>Whether employee/self-employed in paid work before starting college course.</td>
</tr>
<tr>
<td>Cwork7</td>
<td>Whether working full-time/part-time in paid work before starting course.</td>
</tr>
<tr>
<td>Cwork8</td>
<td>Whether had responsibility for supervising the work of other employees in paid work before starting course.</td>
</tr>
<tr>
<td>Cwork10</td>
<td>How many employees at place where worked before starting course.</td>
</tr>
<tr>
<td>CWork11</td>
<td>Whether worked on own or had employees where worked before starting course.</td>
</tr>
<tr>
<td>CWork12</td>
<td>How many people student employed at the place where worked before starting course.</td>
</tr>
<tr>
<td>WELID1</td>
<td>Whether consider national identity to be Welsh.</td>
</tr>
<tr>
<td>WELID2</td>
<td>Whether consider national identity to be English.</td>
</tr>
<tr>
<td>WELID3</td>
<td>Whether consider national identity to be Scottish.</td>
</tr>
<tr>
<td>WELID4</td>
<td>Whether consider national identity to be British.</td>
</tr>
<tr>
<td>WELID5</td>
<td>Whether consider national identity to be Other.</td>
</tr>
<tr>
<td>WELID95</td>
<td>Whether consider national identity to be 'Other specific answer'.</td>
</tr>
<tr>
<td>WELID96</td>
<td>Whether consider national identity to be 'Other irrelevant answer'.</td>
</tr>
<tr>
<td>WELID97</td>
<td>Whether consider national identity to be 'Other not codeable answer'.</td>
</tr>
<tr>
<td>WELID98</td>
<td>Whether consider national identity to be 'Don't Know'.</td>
</tr>
<tr>
<td>WELID99</td>
<td>Whether consider national identity to be 'Refusal'.</td>
</tr>
<tr>
<td>ETH</td>
<td>Ethnic group.</td>
</tr>
<tr>
<td>DISAB1</td>
<td>Whether has health conditions/illnesses that affect Vision.</td>
</tr>
<tr>
<td>DISAB2</td>
<td>Whether has health conditions/illnesses that affect Hearing.</td>
</tr>
<tr>
<td>DISAB3</td>
<td>Whether has health conditions/illnesses that affect Mobility.</td>
</tr>
<tr>
<td>DISAB4</td>
<td>Whether has health conditions/illnesses that affect Dexterity.</td>
</tr>
<tr>
<td>DISAB5</td>
<td>Whether has health conditions/illnesses that affect Learning or understanding or concentrating.</td>
</tr>
<tr>
<td>DISAB6</td>
<td>Whether has health conditions/illnesses that affect Memory</td>
</tr>
<tr>
<td>DISAB7</td>
<td>Whether has health conditions/illnesses that affect Mental Health</td>
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<tr>
<td>DISAB8</td>
<td>Whether has health conditions/illnesses that affect Stamina or breathing or fatigue</td>
</tr>
<tr>
<td>DISAB9</td>
<td>Whether has health conditions/illnesses that affect Socially or behaviourally</td>
</tr>
<tr>
<td>DISAB10</td>
<td>Whether has health conditions/illnesses that affect Other (please specify)</td>
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<tr>
<td>DISAB11</td>
<td>Whether has health conditions/illnesses that affect: None of the above</td>
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<td>Whether has health conditions/illnesses - other specific answer</td>
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<tr>
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<td>Whether has health conditions/illnesses - other irrelevant answer</td>
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<tr>
<td>DISAB97</td>
<td>Whether has health conditions/illnesses - Other not codeable answer</td>
</tr>
<tr>
<td>DISAB98</td>
<td>Whether has health conditions/illnesses - Don't Know</td>
</tr>
<tr>
<td>DISAB99</td>
<td>Whether has health conditions/illnesses - Refusal</td>
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</table>

**SEX**
- Sex

**RELIG**
- Religion

**Diary**
- Filling in Diary

### Diary DVs

<table>
<thead>
<tr>
<th>Diary DV</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>xdytra12</td>
<td>Diary DV - annual study-related travel expenditure</td>
</tr>
<tr>
<td>xdytrb12</td>
<td>Diary DV - annual leisure-related travel expenditure</td>
</tr>
<tr>
<td>xdytrc12</td>
<td>Diary DV - annual child-related travel</td>
</tr>
<tr>
<td>xdytpetr12</td>
<td>Diary DV - annual petrol</td>
</tr>
<tr>
<td>xdytrer12</td>
<td>Diary DV - annual parking for college/work</td>
</tr>
<tr>
<td>xdytrf12</td>
<td>Diary DV - annual parking for leisure</td>
</tr>
<tr>
<td>xdytrx12</td>
<td>Diary DV - annual travel-related - other</td>
</tr>
<tr>
<td>xdyllia12</td>
<td>Diary DV - annual lifestyle -cinema, theatre concerts</td>
</tr>
<tr>
<td>xdyllfb12</td>
<td>Diary DV - annual lifestyle - nightclubs, discos etc</td>
</tr>
<tr>
<td>xdyllfc12</td>
<td>Diary DV - annual lifestyle - sports etc</td>
</tr>
<tr>
<td>xdyllfd12</td>
<td>Diary DV - annual lifestyle - religious activities</td>
</tr>
<tr>
<td>xdyllfe12</td>
<td>Diary DV - annual lifestyle - national lottery/betting</td>
</tr>
<tr>
<td>xdyllfx12</td>
<td>Diary DV - annual lifestyle - other</td>
</tr>
<tr>
<td>xdypera12</td>
<td>Diary DV - annual personal - clothes etc</td>
</tr>
<tr>
<td>xdyperb12</td>
<td>Diary DV - annual personal - CDs music DVDs etc</td>
</tr>
<tr>
<td>xdyperc12</td>
<td>Diary DV - annual personal - cigarettes tobacco</td>
</tr>
<tr>
<td>xdyperd12</td>
<td>Diary DV - annual personal - newspapers books etc</td>
</tr>
<tr>
<td>xdypere12</td>
<td>Diary DV - annual personal - gifts &amp; cards</td>
</tr>
<tr>
<td>xdyperf12</td>
<td>Diary DV - annual personal - prescriptions medicine</td>
</tr>
<tr>
<td>xdyperg12</td>
<td>Diary DV - annual personal - toiletries</td>
</tr>
<tr>
<td>xdyperh12</td>
<td>Diary DV - annual personal - haircuts and grooming</td>
</tr>
<tr>
<td>xdyperx12</td>
<td>Diary DV - annual personal other</td>
</tr>
<tr>
<td>xdyfda12</td>
<td>Diary DV - annual food - meals out</td>
</tr>
<tr>
<td>xdyfdb12</td>
<td>Diary DV - annual food - beer wine spirits</td>
</tr>
<tr>
<td>xdyfdc12</td>
<td>Diary DV - annual food - non-alc drinks</td>
</tr>
<tr>
<td>xdyfdd12</td>
<td>Diary DV - annual food - other</td>
</tr>
<tr>
<td>xdyhoua12</td>
<td>Diary DV - annual household - food drink in</td>
</tr>
<tr>
<td>xdyhoub12</td>
<td>Diary DV - annual household - alcohol</td>
</tr>
<tr>
<td>xdyhouc12</td>
<td>Diary DV - annual household - household goods</td>
</tr>
<tr>
<td>xdyhoud12</td>
<td>Diary DV - annual household - servicing repairs</td>
</tr>
<tr>
<td>xdyhoue12</td>
<td>Diary DV - annual household - laundry dry cleaning</td>
</tr>
<tr>
<td>xdyhouf12</td>
<td>Diary DV - annual household - kitty</td>
</tr>
<tr>
<td>xdyhoux12</td>
<td>Diary DV - annual household - other</td>
</tr>
<tr>
<td>xdyx212</td>
<td>Diary DV - other payments</td>
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## Expenditure DVs

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
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<tbody>
<tr>
<td>XFOOD</td>
<td>Spending on food and non-alcoholic drinks</td>
</tr>
<tr>
<td>XPERST</td>
<td>Personal spending</td>
</tr>
<tr>
<td>XENTERT</td>
<td>Spending on entertainment</td>
</tr>
<tr>
<td>XHHGOODT</td>
<td>Spending on household goods</td>
</tr>
<tr>
<td>XLIVTRAT</td>
<td>Spending on travel</td>
</tr>
<tr>
<td>XOTHLIVT</td>
<td>Spending on other living costs</td>
</tr>
<tr>
<td>XRENT</td>
<td>Spending on rent</td>
</tr>
<tr>
<td>XRETAINE</td>
<td>Spending on retainer</td>
</tr>
<tr>
<td>XOTHHOUS</td>
<td>Spending on other household bills</td>
</tr>
<tr>
<td>XBOOKS</td>
<td>Spending on books and equipment</td>
</tr>
<tr>
<td>XPARTRAV</td>
<td>Spending on travel relating to work, study and childcare</td>
</tr>
<tr>
<td>XFEECON</td>
<td>Cost of fees - trimmed</td>
</tr>
<tr>
<td>XCHILD</td>
<td>Total spending on children</td>
</tr>
<tr>
<td>XLIVING</td>
<td>Total living costs</td>
</tr>
<tr>
<td>XHOUSE</td>
<td>Total housing costs</td>
</tr>
<tr>
<td>XPARTIC</td>
<td>Total participation costs</td>
</tr>
<tr>
<td>XSPEND</td>
<td>Total expenditure</td>
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## Debt and Saving DVs

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>XARR</td>
<td>Arrears - with partner adjustments+trimmed</td>
</tr>
<tr>
<td>XCDLDEBT</td>
<td>Career development loan debt amount</td>
</tr>
<tr>
<td>XSTUDEBT</td>
<td>Outstanding student loan debt</td>
</tr>
<tr>
<td>XACCDEBT</td>
<td>Access to finance</td>
</tr>
<tr>
<td>XOD</td>
<td>Overdraft</td>
</tr>
<tr>
<td>XCREDIT</td>
<td>Commercial credit</td>
</tr>
<tr>
<td>XBORR</td>
<td>Total borrowing</td>
</tr>
<tr>
<td>XSAVE</td>
<td>Total savings</td>
</tr>
<tr>
<td>XSAVEINC</td>
<td>Used savings for income</td>
</tr>
<tr>
<td>XFEECON</td>
<td>Cost of fees</td>
</tr>
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</table>

## Income DVs

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>XIncome</td>
<td>Total income</td>
</tr>
<tr>
<td>XFamily</td>
<td>Income from family (after partner adjustment)</td>
</tr>
<tr>
<td>XParents</td>
<td>Contributions from parents and other relatives</td>
</tr>
<tr>
<td>XShare</td>
<td>Share of partners income (negative value indicates student contributes to partner's costs)</td>
</tr>
<tr>
<td>XPARTNER</td>
<td>Gifts of money from partner</td>
</tr>
<tr>
<td>XLoan</td>
<td>Student loan for fees</td>
</tr>
<tr>
<td>XFeeGR</td>
<td>Fee grant for part time students</td>
</tr>
<tr>
<td>XMntG</td>
<td>Maintenance grant</td>
</tr>
<tr>
<td>XAccess</td>
<td>Access to Learning Funds/ Financial Contingency Funds</td>
</tr>
<tr>
<td>XCOuGr</td>
<td>Course Grant</td>
</tr>
<tr>
<td>XOSTud</td>
<td>Other sources of student support</td>
</tr>
<tr>
<td>XChSup</td>
<td>Child related support</td>
</tr>
<tr>
<td>XDep</td>
<td>Adult Dependents' grant</td>
</tr>
<tr>
<td>XTeach</td>
<td>Teaching related support</td>
</tr>
<tr>
<td>XNHS</td>
<td>NHS related support</td>
</tr>
<tr>
<td>XDisab</td>
<td>Disabled student allowances</td>
</tr>
<tr>
<td>XCDL</td>
<td>Career Development Loans</td>
</tr>
<tr>
<td>XEmpl</td>
<td>Employer support</td>
</tr>
<tr>
<td>XWBR5S</td>
<td>University/College scholarships or bursaries in Wales (inc. Welsh Bursary Scheme)</td>
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<tr>
<td>XScol</td>
<td>University/College scholarships or bursaries in England</td>
</tr>
<tr>
<td>XothStud</td>
<td>Other (eg EU program/charities/OU funds/Travel Grant)</td>
</tr>
<tr>
<td>XWorkXV</td>
<td>Income from paid work</td>
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<tr>
<td>XPJob</td>
<td>Income from continuous job</td>
</tr>
<tr>
<td>Variable</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
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<tr>
<td>XOthInc</td>
<td>Other miscellaneous income (after partner adjustment)</td>
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<tr>
<td>XMloan</td>
<td>Student loan for maintenance</td>
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<td>Xbens</td>
<td>Income from social security benefits (after partner adjustment)</td>
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<tr>
<td>Xfutwrk</td>
<td>Expected income from future work not reported elsewhere</td>
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<tr>
<td>Xothjxv</td>
<td>Other paid work (excluding summer vacation)</td>
</tr>
<tr>
<td>XMstud</td>
<td>Main sources of student support</td>
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<tr>
<td>XChCgr</td>
<td>Childcare grant</td>
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<td>XPLA</td>
<td>Parents Learning Allowance</td>
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<td>XAFS</td>
<td>Fee support from university/college</td>
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<td>XUNICL</td>
<td>Support from Student's university or college</td>
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<tr>
<td>OneYrCrs</td>
<td>Whether on a 1 year course</td>
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<tr>
<td>XSUMMER</td>
<td>Summer vacation work (continuing students for 13 weeks of summer vacation)</td>
</tr>
<tr>
<td>XSUMMER2</td>
<td>Summer vacation work (continuing students without trimming of weeks)</td>
</tr>
<tr>
<td>Xothjob</td>
<td>Income from 'other' jobs over the whole year including summer vacation (continuing students)</td>
</tr>
<tr>
<td>Xwork</td>
<td>Total income from paid work over the whole year including summer vacation (continuing students)</td>
</tr>
<tr>
<td>xincwsv</td>
<td>Est total income over the whole year including summer vacation work - continuing students (after partner adjustment)</td>
</tr>
<tr>
<td>XwrrxvBnd1k</td>
<td>Earnings from paid work - banded 1000s</td>
</tr>
<tr>
<td>XwrrxvBnd5</td>
<td>Earnings from paid work – banded 500s</td>
</tr>
<tr>
<td>PermOthrJob</td>
<td>Types of job</td>
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<tr>
<td>XincBnd1k</td>
<td>Total income - banded 1000s</td>
</tr>
<tr>
<td>XincBnd5</td>
<td>Total income – banded 500s</td>
</tr>
<tr>
<td>XMlnBnd5</td>
<td>Maintenance grant – banded 500s</td>
</tr>
<tr>
<td>XMntgBnd5</td>
<td>Maintenance grant – banded 500s</td>
</tr>
<tr>
<td>XprntsBnd1k</td>
<td>Income from parents and other relatives - banded 1000s</td>
</tr>
<tr>
<td>XprntsBnd5</td>
<td>Income from parents and other relatives – banded 500s</td>
</tr>
<tr>
<td>XWFeeGr</td>
<td>Tuition fee grant for Welsh FT students (imputed - not included in total income)</td>
</tr>
<tr>
<td>XBen01</td>
<td>Whether receive Child Benefit</td>
</tr>
<tr>
<td>XBen02</td>
<td>Whether receive Child Tax Credit</td>
</tr>
<tr>
<td>XBen03</td>
<td>Whether receive Retirement Pension or Widow's pension</td>
</tr>
<tr>
<td>XBen04</td>
<td>Whether receive Whether receive Pension Credit</td>
</tr>
<tr>
<td>XBen05</td>
<td>Whether receive Carer's Allowance</td>
</tr>
<tr>
<td>XBen06</td>
<td>Whether receive Employment and Support Allowance</td>
</tr>
<tr>
<td>XBen07</td>
<td>Whether receive Working Tax Credit</td>
</tr>
<tr>
<td>XBen08</td>
<td>Whether receive Childcare element of Working Tax Credit</td>
</tr>
<tr>
<td>XBen09</td>
<td>Whether receive Job Seeker's Allowance/other unemployment benefits</td>
</tr>
<tr>
<td>XBen10</td>
<td>Whether receive Income Support</td>
</tr>
<tr>
<td>XBen11</td>
<td>Whether receive Housing Benefit</td>
</tr>
<tr>
<td>XBen12</td>
<td>Whether receive Local Housing Allowance</td>
</tr>
<tr>
<td>XBen14</td>
<td>Whether receive benefits - 'none of these'</td>
</tr>
<tr>
<td>XBen15</td>
<td>Whether receive Council Tax Benefit</td>
</tr>
<tr>
<td>XBen16</td>
<td>Whether receive benefits - Pension fund</td>
</tr>
<tr>
<td>XBen17</td>
<td>Whether receive disability/invalidity/incapacity/sickness benefit</td>
</tr>
<tr>
<td>XBen18</td>
<td>Whether receive Council Tax discount because of being student</td>
</tr>
<tr>
<td>XBen19</td>
<td>Whether receive general disabled students allowance/specialist/non-medical helpers allowance</td>
</tr>
<tr>
<td>XBen95</td>
<td>Whether receive benefits - other specific answer</td>
</tr>
<tr>
<td>XBen96</td>
<td>Whether receive benefits other irrelevant answer</td>
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<tr>
<td>XBen97</td>
<td>Whether receive benefits - other not codeable answer</td>
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</table>
Numerical variables

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
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<tbody>
<tr>
<td>XBen98</td>
<td>Whether receive benefits - Don't Know</td>
</tr>
<tr>
<td>XBen99</td>
<td>Whether receive benefits - Refusal</td>
</tr>
<tr>
<td>Xmarjoin</td>
<td>Whether married or has joint financial responsibility</td>
</tr>
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</table>

**Demographic variables**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
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<td>PSU</td>
<td>PSU</td>
</tr>
<tr>
<td>STRATA</td>
<td>STRATA</td>
</tr>
<tr>
<td>NSClass1</td>
<td>NS-SEC (1) FT indep student former occupation</td>
</tr>
<tr>
<td>NSClass2</td>
<td>NS-SEC (2) FT dep student occupation of main income earner</td>
</tr>
<tr>
<td>NSClass3</td>
<td>NS-SEC (3) PT student current or former occupation</td>
</tr>
<tr>
<td>nsclasst</td>
<td>NS-SEC (T) for all students - see nssum for basis of classification</td>
</tr>
<tr>
<td>nsclast3</td>
<td>Social class - 3 levels</td>
</tr>
<tr>
<td>NvrWrkd</td>
<td>Student/parents never worked prior to start of course (depending on student status)</td>
</tr>
<tr>
<td>FTPTdom</td>
<td>Mode and domicile</td>
</tr>
<tr>
<td>AgeGr1</td>
<td>Age Group (at start of academic year)</td>
</tr>
<tr>
<td>AgeGrPT</td>
<td>Age Group (at start of academic year - part-time students)</td>
</tr>
<tr>
<td>EthGr</td>
<td>Ethnicity</td>
</tr>
<tr>
<td>EthBME</td>
<td>Ethnicity - 2 cats</td>
</tr>
<tr>
<td>XlivPar</td>
<td>Lives with parents (during term time)</td>
</tr>
<tr>
<td>MarStat</td>
<td>Marital status summary</td>
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<tr>
<td>Marst2</td>
<td>Couple or not</td>
</tr>
<tr>
<td>Kids</td>
<td>Kids in HH or not</td>
</tr>
<tr>
<td>Family</td>
<td>Family type</td>
</tr>
<tr>
<td>STAT</td>
<td>Independent or dependent student status</td>
</tr>
<tr>
<td>Family2</td>
<td>Family situation (combining groups with children)</td>
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</tbody>
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## Appendix 6 – Trimming

<table>
<thead>
<tr>
<th>Name of DV</th>
<th>Description of CAPI items included in DV (these have been adjusted for diary variables and joint financial responsibility)</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INCOME DVS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>XFAMILY</td>
<td>Income from Family</td>
<td>None necessary (trimmed at lower level Dvs).</td>
</tr>
<tr>
<td>Xparents</td>
<td>Contributions/support from parents</td>
<td>Divide fee costs by number of years (for 7 cases). Divide Parents1-3 by 3 for 3 FT cases.</td>
</tr>
<tr>
<td>XPartner</td>
<td>Contributions/support from partner</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>Xshare</td>
<td>Share of partners income</td>
<td>[TRIM Xpartinc TO NEXT HIGHEST £75000]</td>
</tr>
<tr>
<td>XMSTUD</td>
<td>Income from mainstream sources of student support</td>
<td>None necessary (trimmed at lower level Dvs).</td>
</tr>
<tr>
<td>Xfloan</td>
<td>Fee loan</td>
<td>Divide fee loan amount by N of years for first 6 cases. Set Xfloan to fee cost amount for remaining 6 outliers.</td>
</tr>
<tr>
<td>Xfeeigr</td>
<td>Fee grant</td>
<td>None</td>
</tr>
<tr>
<td>xmloan</td>
<td>Maintenance loan</td>
<td>Recode 6 cases with termly LAM2 &gt;= 4000 AS ANNUAL, trim remaining 9 cases &gt; 9000 to 9000.</td>
</tr>
<tr>
<td>xmntg</td>
<td>Maintenance grant</td>
<td>Treat 24 Eng 'termly' cases as annual. Trim 6 high annual Eng cases to next highest (£4500). Treat 5 Welsh 'termly' cases as annual. Trim 2 Welsh annual cases to next highest £6000.</td>
</tr>
<tr>
<td>xaccess</td>
<td>Access to learning funds</td>
<td>None</td>
</tr>
<tr>
<td>xcougr</td>
<td>Course grant</td>
<td>None</td>
</tr>
<tr>
<td>XOSTUD</td>
<td>Wider sources of student funding</td>
<td>None necessary (trimmed at lower level Dvs).</td>
</tr>
<tr>
<td>xchsup</td>
<td>Child related support</td>
<td>None</td>
</tr>
<tr>
<td>xdep</td>
<td>Adult dependents support</td>
<td>None</td>
</tr>
<tr>
<td>xteach</td>
<td>Teaching support</td>
<td>Amend one case from £54000 to £6000.</td>
</tr>
<tr>
<td>xnhs</td>
<td>NHS bursaries and funding</td>
<td>Amend two cases from £24000 to £8000. Amend extra weeks part of xnhs to £100 per week for one case.</td>
</tr>
<tr>
<td>xdisab</td>
<td>Disability support</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xcdl</td>
<td>Career development loans</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xempi</td>
<td>Employer support</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xunicl</td>
<td>University/college support</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xothstud</td>
<td>Other student support</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>XWORKXV</td>
<td>Income from paid work</td>
<td>None necessary (trimmed at lower level Dvs).</td>
</tr>
<tr>
<td>xpjob</td>
<td>Continuous job</td>
<td>Trimmed to £60,000.</td>
</tr>
<tr>
<td>xothjxv</td>
<td>Other jobs</td>
<td>Trimmed to £30,650.</td>
</tr>
<tr>
<td>XBENS</td>
<td>Income from benefits</td>
<td>Amend one case from £3370 per week to £33.70 per week. Amend 26 cases to reflect weekly amounts rather than monthly (by dividing by 4). Trim one case with £833 per week for RWS pension to next highest (£215 per week). Amend one case with £9617 per week for Housing Ben to £66.17</td>
</tr>
<tr>
<td>Variable</td>
<td>Description</td>
<td>Trimmed Amount</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>XOTHINC</td>
<td>Other income</td>
<td>Not trimmed</td>
</tr>
<tr>
<td>XINCOME</td>
<td>Total Income</td>
<td>None necessary (trimmed at lower level Dvs)</td>
</tr>
<tr>
<td>XFOOD</td>
<td>Spending on food (from diary variables only)</td>
<td>None necessary (trimmed at lower level Dvs)</td>
</tr>
<tr>
<td>XPERST</td>
<td>Spending on landline and mobile telephones, glasses/contact lenses, dental or treatment or buying a mobile phone</td>
<td>Trim to £8000</td>
</tr>
<tr>
<td>XENTERT</td>
<td>Spending on unspecified items over £50</td>
<td>Trim to £6837</td>
</tr>
<tr>
<td>XHHGOODT</td>
<td>Spending on furniture, carpets, bedding, white goods eg. washing machine, and other small household appliances</td>
<td>Trim to £6550</td>
</tr>
<tr>
<td>XLIVTRAV</td>
<td>Spending on general travel ie vehicle maintenance, travel between family home and uni/college, total cost of holidays and spending on a bike, moped, car or van.</td>
<td>Trim to £6500</td>
</tr>
<tr>
<td>XOTHLIVT</td>
<td>Spending on maintenance for former partner/children</td>
<td>Trim to £4000</td>
</tr>
<tr>
<td>XRENT</td>
<td>Total spending on rent and mortgages (including any spend that is rebated through housing benefit)</td>
<td>Trim to £10000</td>
</tr>
<tr>
<td>XRETAINE</td>
<td>Spending on retainers over vacations</td>
<td>Trim to £2000</td>
</tr>
<tr>
<td>XOTHHOUS</td>
<td>Spending on council tax, household bills, and spending on buildings/contents insurance</td>
<td>Trim to £6000</td>
</tr>
<tr>
<td>XBOOKS</td>
<td>Spending on books, workbooks, papers, pamphlets, photocopying, stationery etc, study related computers, special equipment for the course or other course expenditure e.g. amenity fees</td>
<td>Trim to £3000</td>
</tr>
<tr>
<td>XPARTRAV</td>
<td>Travel and child care related to studying, ie petrol or fares to college, cost of childcare, costs of any study trips</td>
<td>Not trimmed</td>
</tr>
<tr>
<td>XFEESCON</td>
<td>Cost of fees</td>
<td>Trim to £5000</td>
</tr>
<tr>
<td>XLIVING</td>
<td>All living costs excluding Spn4 and Spn5</td>
<td>N/A</td>
</tr>
<tr>
<td>XCHILD</td>
<td>All spending on children</td>
<td>N/A</td>
</tr>
<tr>
<td>XHOUSE</td>
<td>All housing costs</td>
<td>N/A</td>
</tr>
<tr>
<td>XPARTIC</td>
<td>All participation costs</td>
<td>N/A</td>
</tr>
<tr>
<td>XSPEND</td>
<td>Total spending</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>EXPENDITURE DVS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>XARR</td>
<td>Arrears at the end of the year on things such as rent, utility bills, HP agreements, tuition fees, TV licence, road tax, child/partner maintenance, council tax, credit cards, childcare payments etc</td>
<td>Trim to £8000</td>
</tr>
<tr>
<td>XCDLDEBT</td>
<td>Debt from career development loan</td>
<td>Trim to £5000</td>
</tr>
<tr>
<td>XSTUDEBT</td>
<td>Amount of debt on student loans by the end of the year, including previous loans and the loan in 2004/5</td>
<td>Trim to £30000</td>
</tr>
<tr>
<td>XACCDEBT</td>
<td>Amount owed on Access to Learning or Financial Contingency Funds (if the student has to pay these back)</td>
<td>Not trimmed</td>
</tr>
<tr>
<td>XCREDIT</td>
<td>Credit card balances, outstanding commercial loans and amounts owed through HP at the end of the year</td>
<td>Trim to £15,516</td>
</tr>
<tr>
<td>XOD</td>
<td>Amount of overdraft at the end of the year</td>
<td>Trim to £2500</td>
</tr>
<tr>
<td>Name of DV</td>
<td>Description of CAPI items included in DV (these have been adjusted for diary variables and joint financial responsibility)</td>
<td>Action</td>
</tr>
<tr>
<td>------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>xdytra12</td>
<td>Diary DV - annual study-related travel expenditure (DiaryDerived.xdytra12)</td>
<td>Trim to £4817</td>
</tr>
<tr>
<td>xdytrb12</td>
<td>Diary DV - annual leisure-related travel expenditure (DiaryDerived.xdytrb12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdytrc12</td>
<td>Diary DV - annual child-related travel (DiaryDerived.xdytrc12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdypetr1</td>
<td>Diary DV - annual petrol (DiaryDerived.xdypetr12)</td>
<td>Trim to £5850</td>
</tr>
<tr>
<td>xdytre12</td>
<td>Diary DV - annual parking for college/work (DiaryDerived.xdytre12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdytrf12</td>
<td>Diary DV - annual parking for leisure (DiaryDerived.xdytrf12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdytrx12</td>
<td>Diary DV - annual travel-related - other (DiaryDerived.xdytrx12)</td>
<td>Trim to £1560</td>
</tr>
<tr>
<td>xdlifa1</td>
<td>Diary DV - annual lifestyle - cinema, theatre concerts (DiaryDerived.xdlifa12)</td>
<td>Trim to £5265</td>
</tr>
<tr>
<td>xdlifb1</td>
<td>Diary DV - annual lifestyle - nightclubs, discos etc (DiaryDerived.xdlifb12)</td>
<td>Trim to £2535</td>
</tr>
<tr>
<td>xdlifc1</td>
<td>Diary DV - annual lifestyle - sports etc (DiaryDerived.xdlifc12)</td>
<td>Trim to £6045</td>
</tr>
<tr>
<td>xdlifd1</td>
<td>Diary DV - annual lifestyle - religious activities (DiaryDerived.xdlifd12)</td>
<td>Trim to £2145</td>
</tr>
<tr>
<td>xdlife1</td>
<td>Diary DV - annual lifestyle - national lottery/betting (DiaryDerived.xdlife12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdlifx1</td>
<td>Diary DV - annual lifestyle - other (DiaryDerived.xdlifx12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdypera1</td>
<td>Diary DV - annual personal - clothes etc (DiaryDerived.xdypera12)</td>
<td>Trim to £16,235</td>
</tr>
<tr>
<td>xdyperb1</td>
<td>Diary DV - annual personal - CDs music DVDs etc (DiaryDerived.xdyperb12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyperc1</td>
<td>Diary DV - annual personal - cigarettes tobacco (DiaryDerived.xdyperc12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyperd1</td>
<td>Diary DV - annual personal - newspapers books etc (DiaryDerived.xdyperd12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyperf1</td>
<td>Diary DV - annual personal - prescriptions medicine (DiaryDerived.xdyperf12)</td>
<td>Trim to £4680</td>
</tr>
<tr>
<td>xdyperg1</td>
<td>Diary DV - annual personal - toiletries (DiaryDerived.xdyperg12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyperh1</td>
<td>Diary DV - annual personal - haircuts and grooming (DiaryDerived.xdyperh12)</td>
<td>Trim to £2847</td>
</tr>
<tr>
<td>xdyperx1</td>
<td>Diary DV - annual personal other (DiaryDerived.xdyperx12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyfda12</td>
<td>Diary DV - annual food - meals out (DiaryDerived.xdyfda12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyfdb12</td>
<td>Diary DV - annual food - beer wine spirits (DiaryDerived.xdyfdb12)</td>
<td>Trim to £5967</td>
</tr>
<tr>
<td>xdyfdc12</td>
<td>Diary DV - annual food - non-alc drinks (DiaryDerived.xdyfdc12)</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyfdd12</td>
<td>Diary DV - annual food - other (DiaryDerived.xdyfdd12)</td>
<td>Trim to £221</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Trim Amount</td>
</tr>
<tr>
<td>--------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>xdyhoua1</td>
<td>Diary DV - annual household - food drink in</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyhoub1</td>
<td>Diary DV - annual household - alcohol</td>
<td>Trim to £2801</td>
</tr>
<tr>
<td>xdyhuc1</td>
<td>Diary DV - annual household - household goods</td>
<td>Trim to £7955</td>
</tr>
<tr>
<td>xdyhoud1</td>
<td>Diary DV - annual household - servicing repairs</td>
<td>Trim to £13,650</td>
</tr>
<tr>
<td>xdyhoue1</td>
<td>Diary DV - annual household - laundry dry cleaning</td>
<td>Not trimmed.</td>
</tr>
<tr>
<td>xdyhouf1</td>
<td>Diary DV - annual household - kitty</td>
<td>Trim to £9750</td>
</tr>
<tr>
<td>xdyhoux1</td>
<td>Diary DV - annual household - other</td>
<td>Trim to £4973</td>
</tr>
<tr>
<td>xdyx212</td>
<td>Diary DV - other payments</td>
<td>Trim to £1957</td>
</tr>
</tbody>
</table>