

# Family Resources Survey (FRS)

# **Guide to Changes**

Prepared for survey year April 2015 – March 2016

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# **Summary**

This booklet describes the main changes made to the FRS questionnaire for the new survey year.

While many of these changes have been made to meet the information needs of policy makers, for example, to reflect changes in benefit receipt, amendments have also been made in response to interviewer feedback – made via the Field Report, which was conducted mid-year, and during briefings.

There are also a number of significant changes linked to the collection of EU-SILC data through the FRS. Every year a whole module of EU-SILC questions is removed and replaced by another – this year we're going to be looking at Social and Cultural Participation and losing some of the Material Deprivation Questions.

#### Key of icons

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

Icon	Description
<b>×</b>	Removed
+	Added
***	Changed

#### Also bear in mind:

Generally, underlining is new text that has been added

Strikethrough is old text that has been removed this year

Thank you to all the interviewers who worked on the 2014-15 FRS. We hope you continue to enjoy working on the survey.

### **Household Grid**

A hard check has been added at 'R' (relationship), if AgeOf is less than 16 and the relation is coded as spouse, as this is not possible.



This person is under 16 years old, please check your coding.

A soft check at  $\mathbf{R}$  (relationship) has been altered to reflect legislation changes in same sex marriages/civil partnerships.



As of 29 March 2014 same sex couples can marry in **England** and **Wales** and as of December 2014 those in civil partnerships can convert this to marriage. There are also plans to allow the conversion of civil partnerships to marriages by the end of 2014. Please check if the couple are married or are in a civil partnership, and code appropriately.

### **Tenure and Address Information**

A new soft check has been added to **YearWhc** (year respondent started living at address) that is activated if a respondent enters a year that is before their date of birth.



Are you sure? The year entered is before respondent's year of birth, please check and amend.

Another soft check has also been added to YearWch that is activated if a respondent's answer provided is greater than the date of the interview.



Are you sure? The date you have provided is in the future. Please check and amend.

#### **Rented Accommodation**

Previously a soft check has been activated at **Rent** if a council property tenant indicated their rent was greater than £100. The amount before the signal is activated has now been increased and the soft check updated to reflect this (weekly amount).



Rent is £[x] for [period code]. That comes to £[x] a week. Rents for Council and New Town tenants are normally below £150 £100 per week.

# **Owned Accommodation and Mortgages**

A new soft check has been added to **BuyYear** (year respondent bought accommodation) that is activated if a respondent enters a year that is before their date of birth.



Are you sure? The year entered is before respondent's year of birth, please check and amend.

The wording at **RMAmt** (total amount of the remortgage) has been reworded. Sometimes the amount given at RMAmt by the respondent is the amount of additional borrowing rather than the new total mortgage amount (i.e. the original mortgage amount plus to remortgage amount). The rewording aims to eliminate the incorrect amount being given. Also removed interviewer note, as no longer required with the rewording.



**₽** RMAmt

What was the total amount of the mortgage, <u>including any remortgage/further advance?</u> <u>after re-mortgaging/taking out the further advance?</u>

INTERVIEWER: TOTAL SHOULD BE AFTER ALL RE-MORTGAGES AND FURTHER ADVANCES

### Council tax and utilities costs

A new question SerComb (if gas and electric are combined) has been added to be asked after SerPay (services paid for).

Added 🛨 ? Combined gas and electricity

**⊶** SerComb

Do you pay for your gas and electricity separately or as a combined amount?

- 1. Separately
- 2. Combined

To account for combined electricity and gas payments, new auto text fill has been added to SerPayAmt (amount paid for utilities) for these cases.



? Amount paid for utilities

- SerPayAmt

How much did you pay for your [automatically filled: Electricity and Gas/Electricity/Gas/Heating or hot water/liquid or solid fuel] last time?

# Water and Sewerage charges

A soft check was added to WSincAmt (amount paid for water and sewerage charges) and is activated if weekly amount entered here is greater than £450 and takes into account the period code entered.



At WinscAmt

If amount paid for water and sewerage is higher than £450 a week

The answer is much higher than the figures usually given at this question.

Please check that your figure is correct. If so suppress warning and continue. Please leave a note if required

#### Childcare

The wording and answer options have been changed at FreeCC (free child care offer), to capture data for each eligible child.



#### ? Free childcare

#### FreeCC

Of the childcare your child(ren) receive does any of this include the free early years education offer? This is available for three and four year olds, and some two years olds.

IF YES: is that all of the childcare or some of the childcare?

- 1. Yes all
- 2. Yes some
- 3. No
- 4. Don't know

Of the childcare [Child's name] receives, does any of this include the free hours of early years education offer? This is available for three and four year olds, and for some two year olds

- <u>1. Yes</u>
- 2. No

For those who answer 'Yes' at FreeCC, there is a new question FreeCCTy, which asks what type of childcare the free hours of early years education has been used for. There is a new show card in place for this question.

# Added 🛨 ? Free Hours Use

**→** FreeCCTy

**SHOW CARD C3** 

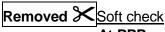
For which type of childcare did you use the free hours of early years education for [Child's name]?

Code all that apply

- 1. Playgroup or pre- school
- 2. Day nursery or workplace crèche
- 3. Nursery school
- 4. Children's centres/integrated centres
- 5. Childminder
- 6. Other

# **Benefit Unit Schedule**

An Interviewer signal at **PPPer**, has been changed to a hard check, to ensure the person coded at PPPer (person answering for proxy), isn't the proxy person. Previously this was suppressible.



At PPPer

<sup>←</sup> Al@/This is Anames[Ipno]. Please change.



\*\*I@/This is ^name[lpno]. The proxy respondent cannot be the same person. Please change.

### **Child Health Questions**

The wording to **ChCondition** (child illness) has been changed as was not relevant. The interviewer instructions for this question also been removed as they did not apply to children



? Limiting longstanding illness

**₽** ChCondition

Does [child's name's] condition or illness/do these conditions or illnesses reduce [child's name's] ability to carry-out day-to-day activities?

- 1. Yes, a lot
- 2. Yes, a little
- 3. Not at all

**INTERVIEWER:** Day to day activities include washing and dressing, household cleaning, cooking, shopping for essentials, using public or private transport, remembering to pay bills, lifting objects from the ground or lifting objects from a work surface in the kitchen.

### **Education, Awards and Loans**

There are 3 additional response options at **HiQual3** (qualifications held by respondent) and a slight change to response option 30. The interviewer instruction has been updated with the new total of response options, and show cards have been updated detailing the new response options. Following the new response options, there are two new questions NatScot and SkiWork.

# Changed

### ?Highest qualification

₽ HiQual3

Show card F1 and Show card F2 Which qualifications do (you think) you have? Please record ALL qualifications.

**INTERVIEWER:** Allow the respondent time to look at both cards. There are 35 32 codes.

- 1. Degree level qualification including foundation degrees, graduate membership of a professional institute or PGCE or higher.
- 2. Diploma in higher education
- 3. HNC/HND
- 4. ONC/OND
- 5. BTEC/ BEC/ TEC / EdExcel / LQL
- 6. SCOTVEC/ SCOTEC/ SCOTBEC (Scotland)
- 7. Teaching qualification (excluding PGCE)
- 8. Nursing or other medical qualification not yet mentioned
- 9. Other higher education qualification below degree level
- 10. A level / GCE in Applied Subjects or equivalent
- 11. New Diploma
- 12. Welsh Baccalaureate
- 13. Scottish Baccalaureate
- 14. international Baccalaureate
- 15. NVQ/SVQ
- 16. GNVQ/GSVQ
- 17. AS level or equivalent
- 18. Certificate of Sixth Year Studies (CSYS) (Scotland)
- 19. Access to HE
- 20. O level or equivalent
- 21. Nationals (Scotland)
- 22. Skills for work (Scotland)
- 23. Standard Grade or Ordinary Grade / Lower (Scotland)
- 24. GCSE / Vocational GCSE
- 25. CSE
- 26. Advanced Higher/ Higher/ Intermediate/ Access qualifications
- 27. RSA/OCR
- 28. City and Guilds
- 29. YT Certificate/YTP
- 30. Key Skills (Eng. Wales & NI) / Core Skills (Scotland)/Essentail Skills (Wales)
- 31. Basic skills (skills for life/ literacy/ numeracy/ language)
- 32. Entry Level Qualifications
- 33. Award, Certificate or Diploma, at entry level and level 1 to 8
- 34. Any other professional/vocational/ foreign qualifications

#### 35. Don't know

Added ? Highest National (Scotland) qualification

#### ► NatScot

You mentioned you have passes in a National (Scotland) qualification. What is the highest level that you achieved? Is it a ...

**INTERVIEWER**: Running prompt

- 1. National 1
- 2. National 2
- 3. National 3
- 4. National 4
- 5. National 5

Added + ? Highest Skills for Work (Scotland) qualification

- SkiWork

You mentioned you have a Skills for Work (Scotland) qualification. What is the highest level that you achieved? Is it a ...

**INTERVIEWER**: Running prompt

- 1. National 3
- 2. National 4
- 3. National 5
- 4. Higher

Interviewer instruction added to NVQLev (highest NVQ level), to inform interviewer the codes are listed highest to lowest.



? Level of NVQ/SVQ

**→** NVQlev

What is your highest level of full NVQ/SVQ?

**INTERVIEWER:** Please note the order of the codes is listing the highest to lowest level attained

Code first that applies

- 1. Level 5
- 2. Level 4
- 3. Level 3
- 4. Level 2
- 5. Level 1
- 6. Don't know

Hard checks have been added to **AgeHQual** (age achieved highest qualification) questions, to prevent the age at which the highest qualification was obtained, being reported as higher than the respondents current age.

# Added + Hard check

#### At AgeHQual

INTERVIEWER: This age is higher than the respondent's age [age]. Please check and amend

# Added + Hard check

#### At AgeHighQ1

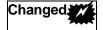
INTERVIEWER: This age is higher than the respondent's age [age]. Please check and amend

# Added + Hard check

#### At AgeHighQ2

INTERVIEWER: This age is higher than the respondent's age [age]. Please check and amend

There are 3 additional response options at **CurQual** (qualifications working towards by respondent) and a slight change to response option 30. The interviewer instruction has been updated with the new total of response options, and show cards have been updated detailing the new response options. Following the new response options, there are two new questions **NatScotNow** and **SkiWrkNow**.



#### ?Current qualification

#### **₽** CurQual

Showcard F1 and Showcard F2 Which qualifications [are you/is [NAME] studying for?

**INTERVIEWER**: If the respondent is currently studying for more than one qualification, please ask them to record which qualification they consider to be the highest. Allow the respondent time to look at both cards. There are  $\underline{35}$  32 codes

- 1. Degree level qualification including foundation degrees, graduate membership of a professional institute or PGCE or higher.
- 2. Diploma in higher education
- 3. HNC/HND
- 4. ONC/OND
- 5. BTEC/ BEC/ TEC / EdExcel / LQL
- 6. SCOTVEC/ SCOTEC/ SCOTBEC (Scotland)
- 7. Teaching qualification (excluding PGCE)
- 8. Nursing or other medical qualification not yet mentioned
- 9. Other higher education qualification below degree level
- 10. A level / GCE in Applied Subjects or equivalent
- 11. New Diploma
- 12. Welsh Baccalaureate

- 13. Scottish Baccalaureate
- 14. international Baccalaureate
- 15. NVQ/SVQ
- 16. GNVQ/GSVQ
- 17. AS level or equivalent
- 18. Certificate of Sixth Year Studies (CSYS) (Scotland)
- 19. Access to HE
- 20. O level or equivalent
- 21. Nationals (Scotland)
- 22. Skills for work (Scotland)
- 23. Standard Grade or Ordinary Grade / Lower (Scotland)
- 24. GCSE / Vocational GCSE
- 25. CSE
- 26. Advanced Higher/ Higher/ Intermediate/ Access qualifications
- 27. RSA/ OCR
- 28. City and Guilds
- 29. YT Certificate/YTP
- 30. Key Skills (Eng. Wales & NI) / Core Skills (Scotland)/Essentail Skills (Wales)
- 31. Basic skills (skills for life/ literacy/ numeracy/ language)
- 32. Entry Level Qualifications
- 33. Award, Certificate or Diploma, at entry level and level 1 to 8
- 34. Any other professional/vocational/ foreign qualifications
- 35. Don't know

# Added + ?National (Scotland) qualification studying for

► NatScotNow

What level of Nationals (Scotland) are you studying for? Is it a ...

**INTERVIEWER:** Running prompt

- 1. National 1
- 2. National 2
- 3. National 3
- 4. National 4
- 5. National 5

# Added + ? Highest Skills for Work (Scotland) qualification studying for

- SkiWorkNow

What level of Skills for Work (Scotland) are you studying for? Is it a ...

**INTERVIEWER:** Running prompt

- 1. National 3
- 2. National 4
- 3. National 5
- 4. Higher

Interviewer instruction added to **NVQLevNow** (highest NVQ working towards), to inform interviewer the codes are listed highest to lowest.

Changed ? Level of NVQ or SVQ

► NVQlevNow

What level NVQ/SVQ are you working towards...

**INTERVIEWER:** : Please note the order of the codes is listing the highest to lowest level attained Code first that applies

- 1. Level 5
- 2. Level 4
- 3. Level 3
- 4. Level 2
- 5. Level 1
- 6. Don't know

# **Student Loan Repayment**

A new question **SLOs** (outstanding student loans) has been added to be asked if SLRepay (if made a student loan repayment) is answered as 'No'. Aims to collect data on those who have an outstanding student loan, but have not made a repayment contribution.

Added + ?Outstanding student loan

**⇔**SLOs

Can I just check, do you have an outstanding student loan?

- 1. Yes
- 2. No

### **Employment Status**

Questions response answer 8 for **Train** (GB), has been reworded to harmonise with the response categories with other major social surveys



? Government Training

♣ Train

SHOW CARD F3

Last week, that is in the seven days ending Sunday the [date], were you on any of the following schemes?

- 1. Work Club or Enterprise Club
- 2. New Enterprise Allowance
- 3. Work Experience
- 4. Work Trial
- 5. Work Programme
- 6. Training for Work [Scotland only option]
- 7. Get Ready for Work [Scotland only option]
- 8. Any other government training scheme
- 9. None of these [spontaneous only]

Some of the response options (8,9,10,11,and 12) for **NITrain** have been removed as they are out of date.



→ NITrain

NI SHOW CARD F3

Last week, that is in the seven days ending Sunday the [date], were you on any of the following schemes?

1. Work Club or Enterprise Club

- 2. New Enterprise Allowance
- 3. Work Experience
- 4. Work Trial
- 5. Work Programme
- 6. Training for Success
- 7. Steps to Work
- 8. Steps 2 Success
- 9. Bridge to employment
- 10. Youth Employment Scheme
- 11. Apprenticeships NI
- 12. Graduate Development Programme
- 13.8. Any other government training scheme
- 44.9. None of these [spontaneous only]

### **Details of Employment**

A soft check has been added to check if **PRBefore** (amount of profit before tax) is less than Profit1 (amount of net profit).



This amount is less than the net amount. Please check and amend

A soft check has been added to **PrevYr** (previous employment start year) that is activated if a respondents answer provided is greater than the date of the interview



Are you sure? The date you have provided is in the future. Please check and amend.

A soft check has been added where **PrevYr/PrevMth** (year/month started previous job), is later than WorkYr/WorkMth (year/month started present job). The check has been added at PrevMth.



This date is after the start date of the respondent's current job. Please check and amend.

A hard check has been added where BonTaxAm1-6 (amount of tax paid on bonus) is greater than BonTaxAmt1-6 (the amount of bonus received).

# Added Hard check At BonTaxAm

The tax amount paid is higher than the bonus amount. Please check and amend

A new soft check has been added to **LstWrk2** (year respondent last worked) that is activated if a respondent enters a year that is before their date of birth.



Are you sure? The year entered is before respondent's year of birth, please check and amend.

Also, another soft check at LstWrk2 was incorrectly being activated if a respondent answered 'don't know' or 'refusal' to this question. The soft check will now only activate if it is entered that the respondent last worked before they were sixteen, and will no longer be activated if don't know or refusal are coded.

A new question has been added, **YJbLev** (reason for leaving job) to allow FRS to supply reasons for respondents leaving work, as FRS can currently do this for those who have changed job, but not for those who have left a job. A new show card (F5) has been created.

# Added # ?Reason for leaving job

#### ⊷YJobLev SHOW CARD F5

For what reason did you leave your last job?

- 1. To take up or seek better job
- 2. End of temporary contract
- 3. Obliged to stop by employer (e.g. redundancy, business closure, early retirement, dismissal etc)
- 4. Sale or closure of family business
- 5. To care for child or other dependent
- 6. Partner's job required move to another area or marriage
- 7. Other reason

The question wording for **JbChnge** (Whether changed employer or contract with current employer in last 12 months) has been changed, to compare the situation now to the situation 12 months ago. This is what the question previously asked for, however, rewording should make this clearer.

# Changed ?? Change of job

#### → JbChnge

Compared to 12 months ago (that is [auto filled with year]), have you... In the last 12 months, have you...

Automatically filled: [changed employer or have you changed your contract with the same employer?]

or

Automatically filled: [changed the nature of your work?]

**INTERVIEWER**: For employees: changing duties without changing contracts should not be counted as a change of employer or contract.

For the self-employed: completing one contract and beginning another does not count as a job change for the self-employed.

- 1. Yes
- 2. No

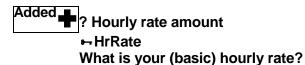
# **Employee Pay Details**

New questions have been added to the pay details part of the questionnaire to make improvements to the way earnings are collected. Respondents will now be asked about hourly rates of pay (**Hourly / HrRate**). Soft checks have also been added to **HrRate**.



→ Hourly
Are you paid a fixed hourly rate?

- 1. Yes
- 2. No



INTERVIEWER: If £995 or more enter 995

Range 000.01 to 995.00

Soft checks have been added to the new variable **HrRate** that are triggered if the amount at HrRate is greater than £50 and less than £6.



This figure is unusually high for an hourly rate, please check your coding.



This figure is unusually low for an hourly rate, please check your coding.

Interviewer instruction at **PaySlip** (whether respondent consulted a payslip) has been changed to incorporate current trend to move towards electronic payslips.



**INTERVIEWER:** Use Code 1 if the payslip shows the latest pay received by the respondent.

Use Code 2 if the payslip shows pay received within the last 3 months or not the latest pay.

Use Code 3 if payslip is more than 3 months old.

Include consultation of electronic payslips

A soft check has been added to **CarAmt** (contributions made towards company car) that is activated if an amount greater than £5000 is entered.



The maximum a person can contribute to a company car is £5,000. Please check and amend.

### **Pension Schemes**

The value in the interviewer instruction at **EligSchm** (eligible to belong to a pension scheme run by employer) has changed. This reflects the change to the minimum income that someone must be earning before they're eligible to be automatically enrolled into a workplace pension scheme, from £9,440 previously to £10,000.



At EligSchm

**INTERVIEWER:** Following auto<u>matic</u> enrolment, employees are eligible for a workplace pension provided by <u>their</u> the employer if they are not already in a qualifying workplace pension, <u>are aged between 22 and SPA or over and under state pension age</u>, earn more than a minimum amount each year (currently £10,000 £9,440) and work or usually work in the UK.

#### State and Other Benefits

### **Working Age benefits**

The code of answer option 10 at **WageBen** (whether claiming working age benefits) has been changed to 97. This is to ensure option 10 is not being coded by mistake as option 10 was being chosen when respondent was not entitled to any benefit at WageBen, or when a benefit has already been indicated.



► WageBen SHOW CARD H1

Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?

- 1. Universal Credit
- 2. Housing benefit
- 3. Working Tax Credit (excluding any childcare element of Working Tax Credit)
- 4. Child tax Credit (including any childcare element of Child-Working Tax Credit)
- 5. Income Support
- 6. Jobseekers Allowance
- 7. Employment and Support Allowance
- 8. Carer's Allowance
- None of these
- 97. 10. (SPONTANEOUS) One of these / more than one of these, but don't know which

The wording on the help screen for option 6 at WageBen has been amended slightly, to reflect the rules of receiving JSA on the gov.uk website.



#### Jobseeker's Allowance (JSA)

From October 1996 Jobseeker's Allowance replaced Unemployment Benefit (UB) and Income Support (IS) for unemployed people (i.e. people actively seeking work but who weren't eligible for Unemployment Benefit). Recipients of those benefits were automatically transferred to JSA.

The basic rules for receipt of JSA are that the claimant must be out of work or working less than 16 hours a week; be capable of work, available for work (usually of at least 40 hours a week) and actively seeking work; have a Jobseeker's Agreement with the Jobcentre Plus; be aged 18 or over and under state pension age; and any studying must only be part-time. (See under **Type of Jobseeker's Allowance** below for further details of JSA).

### **Disability benefits**

The code of answer option 8 at **DisBen** (whether claiming disability benefits) has been changed to 97. This is to ensure option 8 is not being coded by mistake as option 8 was being chosen when respondent was not entitled to any benefit at DisBen, or when a benefit has already been indicated.



#### **₽** DisBen

#### **SHOW CARD H3**

Looking at this card, are you at present receiving any of these state benefits in your own right, or on behalf of another person: that is, where you are the named recipient?

- 1. Personal Independence Payment (including the car allowance known as Motability
- 2. Disability Living Allowance (including the car allowance known as Motability)
- 3. Attendance Allowance
- 4. Severe Disablement Allowance
- 5. Incapacity Benefit
- 6. Industrial Injury Disablement Benefit
- 7. None of these
- 97. (SPONTANEOUS) One of these / more than one of these, but don't know which

#### **Pension Benefits**

The code of answer option 7 at PenBen (whether claiming Pensioner's benefits) has been changed to 97. This is to ensure option 7 is not being coded by mistake as option 7 was being chosen when respondent was not entitled to any benefit at PenBen, or when a benefit has already been indicated



**₽** PenBen

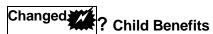
**SHOW CARD H4** 

Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?

- 1. Pension Credit
- 2. State Retirement Pension
- 3. Widow's Pension, Bereavement Allowance or Widowed Parent's (formally Widowed Mother's Allowance)
- 4. Armed Forces Compensation Scheme (formally War Disablement Pension), including Guaranteed Income Payments
- 5. War Widow's / Widower's Pension (and any related allowances)
- 6. None of these
- 97. 7.(SPONTANEOUS) One or more of these, but don't know which

#### Child related benefits

The code of answer option 5 at **KidBen** (whether claiming child related benefits) has been changed to 97. This is to ensure option 5 is not being coded by mistake as option 5 was being chosen when respondent was not entitled to any benefit at KidBen, or when a benefit has already been indicated



**₽** KidBen

**SHOW CARD H5** 

Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?

- 1. Child Benefit
- 2. Guardian's Allowance
- 3. Maternity Allowance
- 4. None of these
- 97. 5. (SPONTANEOUS) One or more of these, but don't know which

The questions wording for CbChk (why did not report receipt of child benefit) has been changed as a new show card has been created. The wording now reflects this, rather than the interviewer reading out the options on screen.

# Changed

#### ? Child benefit check

#### 9→ CBChk

Can I just check, you didn't report receipt of Child Benefit - is this because... you did not say you were getting Child Benefit, is this because of any of the reasons given on this card?

- 1. You have chosen to stop receiving Child Benefit payments due to having a high income
- 2. You have not applied for Child Benefit
- 3. Your partner receives this benefit
- 4. Other reason

### **Social Fund Benefits**

The code of answer option 6 at **SocFund** (whether in receipt of any type of Social Fund benefits) has been changed to 97. This is to ensure option 6 is not being coded by mistake as option 6 was being chosen when respondent was not entitled to any benefit at SocFund, or when a benefit has already been indicated

The wording of answer option 3 has also been amended for **SocFund**, bringing the answer in line with current policy.



**? Social Fund** (there is a 12 month reference period for this question)

# ► SocFund SHOW CARD H7

Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?

- 1. A grant from the Social Fund for funeral expenses
- 2. A grant from the Social Fund for maternity expenses/Sure Start Maternity
- 3. A budgeting loan or budgeting advance loan or grant from DWP
- 4. A loan or grant from your local authority
- 5. None of these
- 97. (SPONTANEOUS) One or more of these, but don't know which

To further bring the questions about Social Funds in line with current policy, there have been several other changes to additional questions asked of respondents about Social

Funds. The questions for **SFRepay** and **SFInc** have been reworded. There has also been removal of references and questions to **Community Care Grants** has been removed.

Additional questions for Social Fund Loans or Community Care Grants



? Social Fund Loan Repayments

**₽** SFRepay

Are you at present making any repayments on any Social Fund loan(s) or advance(s)?

1.Yes

2.No



? Benefits Before or After Social Fund Loan Repayments

₽ SFInc

Just now you said that you got [amount of Income Support/JSA/PC] last time. Was that BEFORE or AFTER taking off your Social Fund loan repayments?

1.BEFORE taking off amount for loan repayment

2.AFTER taking off amount for loan repayment

If SocFund = 3. Social Fund Loan or Community Care Grant

### Removed

< ? Social Fund Loan or Grant

- SFTvpe

Thinking about the money you received from the Social Fund, was that a loan, or a grant? IF BOTH, CODE 1 AND 2.

- 1. Social Fund loan
- 2. Social Fund Community Care grant

If a grant:

- ? Number of Social Fund Grants
- **\$**→ SFGrNum

How many such grants have you had in the past 12 months?

- ? Total Amount of Social Fund Grants
- **SFGrAmt**

About how much did you receive altogether?

If a loan:

? Type of Social Fund Loan

**₽** SFLnType

Was it a Budgeting loan or a Crisis loan?

IF BOTH CODE 1 AND 2

#### Other benefits

The code of answer option 7 at OtherBen (whether in receipt of any other type of benefit) has been changed to 97. This is to ensure option 7 is not being coded by mistake as option 7 was being chosen when respondent was not entitled to any benefit at OtherBen, or when a benefit has already been indicated



# ► OtherBen SHOW CARD H8

Looking at this card, have you received any of these benefits in the last 6 months in your own right: that is, where you are the named recipient?

- 1. 'Extended payment' of Housing Benefit / rent rebate (4 week payment only)
- 2. Bereavement Payment
- 3. In-Work Credit
- 4. Return to Work payment
- 5. Any National Insurance or State Benefit not mentioned earlier
- 6. None of these
- 97. (SPONTANEOUS) One or more of these, but don't know which

# Income from Pensions, Trusts, Royalties and Allowances

From April 2015, people aged 55 and over will be able to use their defined contribution pension pots as they wish. As a result of this, the answer options at **AnyPen** (in receipt of any pensions) need to be more explicit and the interviewer note at AnyPen has been amended to reflect the change.



# ► AnyPen SHOW CARD K1

Are you at present receiving an income from any of the sources shown on this card? Code all that apply.

- 1. An employee pension from a previous employer
- 2. Widow's employee pension (PENSION FROM PREVIOUS EMPLOYER OF DECEASED SPOUSE OR RELATIVE)
- 3. A personal pension
- 4. A pension as a member of a Trade Union or friendly society
- 5. A non-pension fund based annuity (includes home income plan or equity release)
- 6. A trust or covenant
- 7. A share of an employee or personal pension from an ex-spouse/partner as a result of a court order or settlement made on divorce
- 8. None of these



#### At AnyPen

An occupational pension from an overseas government or company should be accepted at this question, if paid in <u>sterling</u>.

If paid in <u>foreign currency</u>, the pension should be treated as unearned income and entered at Royalties.

Regular income from an insurance policy or from equity release (and not purchased from pension funds) should be included under 'non pension fund annuity'. Under equity release schemes (such as Home Income Plan, Reversion schemes, Retirement Home Plan) elderly property owners may take out a loan secured on their home and use it to buy an annuity, part of which provides then with an income. Such a loan/mortgage should be recorded as a second mortgage in the household questionnaire (provided interest on the loan is being paid).

From April 2015, people aged 55 and over will be able to use their Defined Contribution pension pots as they wish with no requirement to purchase an annuity. We expect people to draw on their Defined Contribution pension wealth in different ways including using income drawdown products or informally drawing down their wealth as they need it. These sorts of income streams should be included alongside income from annuities in Code 1 'Employer pension' or Code 3 'Personal Pension'.



**INTERVIEWER:** Please check that the annuity mentioned includes home income plan or equity release. Annuities purchased from pension funds are excluded from Code 5. Annuities, <u>or other income streams</u>, from an occupational pension, <u>including formal or informal income drawdown products</u>, should be coded as Code 1 'Employer pension'. Annuities, <u>or other income streams</u>, from a personal pension should be coded as Code 3 'Personal pension'.

This question relates not only to a private pension received by the informant from their own previous employer but also to a private pension from the employer of a deceased spouse or other relative. Also include receipt of pensions from a *current* employer.

Also in line with this, the question **PenLump** (type of pension lump sum) has been removed, an a new question **PenWealth** (how pension wealth is received) has replaced it to give greater clarity over how individuals access their pension pots whilst removing the need for the PenLump question.

Removed ? Type of Pension Lump Sum

**PenLump**ASK OR CODE:

Can I just check, was that annuity bought with...

- 1. a Lump sum from an EMPLOYEE pension scheme?
- 2. or a lump sum from a PERSONAL pension scheme?
- 3. or neither of these?

# Added ? How Pension Wealth is received

► PenWealth
SHOW CARD K2
ASK OR CODE:

How do you receive your pension? (multiple answers can be accepted)

- 1. Paid by an employer pension scheme
- 2. Paid by a life-time annuity
- 3. Paid from a Flexible income drawdown arrangement
- 4. Cash withdrawn intermittently from a pension pot
- 5. Cash withdrawn in one or several large withdrawals from a pension pot
- 6. Other pension products

An interviewer note has also been added for PenWealth (Please see next page).



#### 1. Employer pension scheme

The income can be paid by a scheme of a previous employer or their existing employer, should their employer allow them to be taking a pension in addition to a paid salary. This is based as a proportion of the individuals or average contributions paid over a number of years.

#### 2. Lifetime annuity

This is a regular income paid for the rest of the individual's life and does not have a specified end date.

The terms of income paid should be set by a contract with an insurance provider or their former pension scheme and paid at agreed intervals (monthly, quarterly or each year) in exchange for the individual's pension savings.

#### 3. Flexible income drawdown arrangement

Please check if they remember choosing a "Flexi-Drawdown" arrangement to access their pension savings. This is a flexible arrangement where the individual leaves their pension invested in agreed fund to provide an income.

#### 4. Cash withdrawn intermittently from a pension pot

Please check with the individual whether has their pension savings are in what is known as an Uncrystalised Pension Flexible Lump Sum (UPFLS).

A UPFLS arrangement allows the individual to access their pension as cash, when they want, similar to a bank account arrangement.

5. Cash withdrawn in a single or several large withdrawals from a pension pot

Please check that the individual either took out substantial withdrawals from their pension pot in a single step, or has or plans to withdrawal the pension pot through using one or two several large withdrawals.

Where the individual is earning an income from investments from re-investing these pension savings, they should answer yes to this response, and not response six.

#### 6. Other pension products

Where the individual has bought a product not listed. These typically include annuities with specific terms of payment, such as;

- Short-term annuities that are paid for a set number of years
- Investment linked annuities, where the rate of payment is variable

This also covers more complex products not captured by responses 1-5.

# Adult and child social deprivation and household items

The following set of Material Deprivation questions are the questions for the EU-SILC module that are to be removed for the new survey.

Removed ? New clothes for children

**₩** EUChClth

**SHOW CARD M5** 

Do ALL the children in your household have some new (not secondhand) clothes?

INTERVIEWER: The focus is on the affordability for the child to have some new clothes. Not all clothes must be new, some can be second-hand. This is particularly the case for young children.

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

Removed ? New shoes for children

**→ EUChShoe** 

**SHOW CARD M5** 

Do ALL the children in your household have at least two pairs of properly fitting shoes (including a pair of all-weather shoes)?

INTERVIEWER: Shoes include boots, sandals and other types of footwear.

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

Removed ? Meal with meat

**--EUChMeat** 

**SHOW CARD M5** 

Do they ALL eat one meal with meat, chicken or fish (or vegetarian equivalent) at least once a day?

INTERVIEWER: The children of the household don't all have to eat meat, chicken or fish at the same time; they don't have to share the same food. The meat, chicken or fish can be eaten at different time and/or place.

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

Removed ? Children's books

**← EUChBook**

**SHOW CARD M5** 

Do they ALL have books at home suitable for their age?

INTERVIEWER: "Books suitable for their age" means that the books are adapted to the age and the level of knowledge of the child. School books are not to be taken into account.

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

# Removed ? Indoor games

- EUChGame

SHOW CARD M5

Do they ALL have indoor games suitable for their ages?

**INTERVEWER:** The "Yes" answer corresponds to the situation where there is at least one indoor game (educational baby toys, building blocks, board games, computer games, etc.) for each child of the household, which is adapted to his/her age and level of knowledge.

Very cheap or self-made equipment are to be included. In addition, it is not strictly required that all children in the household have leisure equipment/games of their own. Sharing is possible.

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

If a child is aged 1-15 and is attending school then:

# Removed ? Indoor games

**→ EUStudy** 

Do <u>ALL</u> the children in your household who attend school have a suitable place to study or do homework?

**INTERVIEWER:** A suitable place to study or do homework means a silent place with enough room and light, at home, rather than outside the house.

1. Yes

2. No

Two Northern Ireland specific questions, EURoast and EUMeal were not being asked of pensioner benefit units. These have now been included to be asked of pensioner benefit units at EURoastOA and EUSMealOA



► EURoastOA SHOW CARD M3

Does your household have a roast joint (or its equivalent) once a week?

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

# Added ↑ ?No substantial meal

#### **₽¬** EUSMealOA

For the next question please answer yes or no.

During the last fortnight was there ever a day (i.e. from getting up to going to bed) when you (and your partner) did not have a substantial meal due to lack of money?

- 1. Yes
- 2. No

A new question at **OAHolB** (holiday from home) has been added as a pensioner specific question.



**₽** OAHoIB

SHOW CARD M3/M1

Do you [and your family/and your partner] have..

a holiday away from home for at least one week a year, whilst not staying with relatives at their home?

**INTERVIEWER:** This is the respondent's own interpretation

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

The amount used within the question wording for both **EUExpnsNonOA** and **EUExpnsOA** (able to pay an unexpected but necessary expense of £750) has been changed to reflect the AROP threshold.

Asked if OAExpns=Yes (would be able to meet an expense of £200).

Changed ?

? Unexpected expense – over pension age

#### **₽** EUExpnsOA

Would your household be able to pay an unexpected, but necessary, expense of £800 £750?

- 1. Yes
- 2. No

Not of pension age questions

Changed ?

? Unexpected expense – under pension age

#### **₽** EUExpnsNonOA

Would your household be able to pay an unexpected, but necessary, expense of £800 £750?

- 1. Yes
- 2. No

The following two questions, **EUPBTrans** and **EUPbTransN** which form part of the EU-SILC material deprivation questions, have been removed. They ask about regular use of public transport and why (adult) respondents might not use public transport.

Removed 2

? Use of public transport

**→** EuPbTrans

Do you regularly use public transport?

- 1. Yes
- 2. No

IF EuPbTrans= No

Removed ? Reason doesn't use public transport

**► EUPbTransN** 

Why do you not use public transport?

INTERVIEWER: Probe to code. Code all that apply.

- 1. Ticket too expensive/costs too much
- 2. Station too far away
- 3. Too difficult to get to
- 4. Use own/private transport
- 5. Other reason

The interviewer instruction at **EUComputer** (if have a computer) have been updated to include guidance on tablets to reflect their growing popularity. Has also been updated to include other new technologies.



Interviewer Instruction

At EUComputer

**INTERVIEWER:** Include items stored or under repair, Include items owned, rented or on loan.

Include tablet and notebook computers.

If any member of the household possesses an item, the household possesses it.

Exclude video games eReaders and computers provided ONLY for work.

The question wording for **EURegularP** (receiving regular payments from friends or relatives outside household) and **EUOutPay** (making regular payments to friends or relatives outside household) have been amended to capture data required for EU SILC. Previously the wording may have been perceived as personal income/expenditure, the new wording should make it clearer that it is asking for household income/expenditure. Also amended question wording to **EURegularPAmt** and **EUOutPAmt** to reflect this.



#### ? Receiving regular payments

#### **►** EURegularP

Are you <u>or anyone in your household</u> receiving regular payments from friends or relatives outside the household?

**INTERVIEWER:** do not include any regular payments recorded elsewhere, for example:

- contributions to the mortgage from family or friends
- parental contribution received by students
- allowances received from absent partners
- child maintenance received
- alimony received
- 1. Yes
- 2. No



#### ?How much received

#### **►** EURegularPAmt

In total, how much do you/<u>your household</u> receive from friends or relatives outside the household each month?

**INTERVIEWER:** do not include any regular payments recorded elsewhere, for example:

- contributions to the mortgage from family or friends
- parental contribution received by students
- allowances received from absent partners
- child maintenance received
- alimony received



?Making payments to friends or family

#### **₽** EUOutPay

Are you <u>or anyone in your household</u> making regular payments to friends or relatives outside the household?

**INTERVIEWER:** do not include any regular payments recorded elsewhere, for example:

- allowances paid to absent partners
- child maintenance paid
- alimony paid
- 1. Yes
- 2. No



#### **₽ EUOutPAmt**

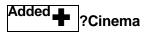
In total, how much do you/ your household give to friends or relatives outside the household each month?

**INTERVIEWER:** do not include any regular payments recorded elsewhere, for example:

- allowances paid to absent partners
- child maintenance paid
- alimony paid

# **Social and Cultural Participation**

To ensure that we collect the necessary information needed for the Eurostat crosssectional delivery, there are fifteen new EU-SILC questions added, relating to Social and Cultural Participation. These are to be asked of all personal interviewers where respondents are 16 and over.



**₽** EUcinema

#### SHOW CARD EU1

Thinking about the last twelve months, did you go to the cinema?

- 1. Yes 4 or more times
- 2. Yes fewer than 4 times
- 3. No could not afford it
- 4. No lack of interest
- 5. No not easy to get to
- 6.No other reasons



Added ?Live sporting events attendance

**₽** EUSport

#### **SHOW CARD EU1**

Thinking about the last twelve months, did you attend a live sporting event?

**INTERVIEWER:** Include going to an event to watch one's own children participate.

- 1. Yes 4 or more times
- 2. Yes fewer than 4 times
- 3. No could not afford it
- 4. No lack of interest
- 5. No not easy to get to
- 6. No other reasons

# Added ?Live performance attendance

#### **₽** EULivePer

#### **SHOW CARD EU1**

Thinking about the last twelve months, did you attend live performances such as plays, concerts, operas, ballet or dance performances?

**INTERVIEWER:** Include going to an event to watch one's own children participate. Exclude visits to live sports events.

- 1. Yes 4 or more times
- 2. Yes fewer than 4 times
- 3. No could not afford it
- 4. No lack of interest
- 5. No not easy to get to
- 6. No other reasons

# Added ?Cultural site visits

#### **₽** EUCulture

#### **SHOW CARD EU1**

Thinking about the last twelve months, did you visit any cultural sites such as ..... historical monuments, museums, stately homes, art galleries or archaeological sites?

**INTERVIEWER**: This is not an exhaustive list and any visit to a site of Cultural or historical significance should be included.

- 1. Yes 4 or more times
- 2. Yes fewer than 4 times
- 3. No could not afford it
- 4. No lack of interest
- 5. No not easy to get to
- 6. No other reasons

# Added ?Practice artistic activities

#### **₽** EUArtAct

#### **SHOW CARD EU2**

How often do you usually practise artistic activities, such as, playing an instrument, composing music, singing, dancing, acting, photography, making a video, drawing or painting, carving or other visual art, handcraft, writing poems or short stories etc... as a hobby?

**INTERVIEWER:** All activities performed as a respondent's professional activity are excluded.

If the respondent performs more than one activity, the time spent on all activities should be counted.

- 1. Daily
- 2. Every week (not every day)
- 3. Several times a month
- 4. Once a month
- 5. At least once a year
- 6. Never

# Added ?Meet with family

#### **₽** EUMeetFam

#### **SHOW CARD EU2**

How often do you get together with your family and relatives?

**INTERVIEWER:** Exclude getting together with family for professional reasons such as work.

- 1. Daily
- 2. Every week (not every day)
- 3. Several times a month
- 4. Once a month
- 5. At least once a year
- 6. Never

# Added ?Meet with friends

#### **₽** EUMeetFri

#### **SHOW CARD EU2**

How often do you get together with friends?

**INTERVIEWER**: Exclude getting together with friends for professional reasons such as work.

- 1. Daily
- 2. Every week (not every day)
- 3. Several times a month
- 4. Once a month
- 5. At least once a year
- 6. Never

# Added ?Contact Family

#### **₽** EUTalkFam

#### **SHOW CARD EU2**

How often do you contact family and relatives by phone, text, letter or the Internet (e.g. e-mail, Skype, Facebook or other social networks or internet communication)?

**INTERVIEWER:** Sharing or viewing photos should not be included

- 1. Daily
- 2. Every week (not every day)
- 3. Several times a month
- 4. Once a month
- 5. At least once a year
- 6. Never

# ?Contact Friends

#### **₽** EUTalkFri

#### SHOW CARD EU2

How often do you contact friends by phone, text, letter or the Internet (e.g. email, Skype, Facebook or other social networks or internet communication)?

**INTERVIEWER**: Sharing or viewing photos should not be included

- 1. Daily
- 2. Every week (not every day)
- 3. Several times a month
- 4. Once a month
- 5. At least once a year
- 6. Never

Added ?Social network interaction

#### **₽** EUSocNet

#### **SHOW CARD EU2**

How often do you interact on social networking sites, such as Facebook, My Space, LinkedIn, Twitter etc?

INTERVIEWER: This includes chat rooms, online discussion forums and other social spaces. Posting messages, photos and "likes" are also included. Interacting means not only joining social media sites but also contributing actively to the discussion.

- 1. Daily
- 2. Every week (not every day)
- 3. Several times a month
- 4. Once a month
- 5. At least once a year
- 6. Never

# Added ?Ask for help

#### **₽** EUAskHelp

Are you able to ask relatives, friends or neighbours for help?

**INTERVIEWER**: Does not include people who live in the same household.

- 1. Yes
- 2. No

Added ?Personal conversations

#### **₽** EUTalkMat

Are you able to talk to at least one person about personal matters?

**INTERVIEWER**: This can be someone who lives in the household.

- 1. Yes
- 2. No



#### **₽** EUVolunteer

#### **SHOW CARD EU3**

During the past 12 months have you done any voluntary work through an organisation, formal group or a club?

**INTERVIEWER:** Include unpaid work for religious organisations and meetings connected with these activities.

- 1. Yes
- 2. No lack of interest
- 3. No lack of time
- 4. No other reason



Added ?Informal voluntary work

#### **₽** EUInformVol

#### **SHOW CARD EU3**

During the past 12 months, have you undertaken any voluntary activities that were not arranged by an organisation?

**INTERVIEWER:** INCLUDE: Helping other people, including family members not in the household, helping animals. Also include activities such as cleaning the beach, forest, etc

EXCLUDE: All activities done undertaken for their own household or work.

- 1. Yes
- 2. No lack of interest
- 3. No lack of time
- 4. No other reason



#### **₽** EUActive

#### **SHOW CARD EU4**

During the past 12 months, have you done any of the things on this card?

**INTERVIEWER:** Include active participation via Internet (e.g. petition, letter, etc.), attending meetings connected with these activities,

There should be no mention or discussion of political affiliation or the nature of the activities undertaken. Voting should not be considered as active citizenship (in some countries voting is compulsory).

- 1. Participate in the activities of a political party or a local interest group
- 2. Participate in a public consultation
- 3. Participate in a peaceful protest or demonstration, including signing a petition
- 4. Write a letter to a politician
- 5. Write a letter to the media



#### **₽** EUActiveNo

Could I just check is the reason you have not done any of these things because...

**INTERVIEWER:** Running prompt

- 1. You are not interested?
- 2. You don't have the time?
- 3. Or is this some other reason?

### **Adults' Savings and Investments**

The response answer option 9 has been removed for **Accounts.** The answer option was removed from the show cards in 2006/2007, however it was left in the CAPI. Option 9 has now been removed.



? Type of Accounts

**→** Accounts

SHOW CARD N1

Which of these accounts do you have now, or have you had in the last 12 months?

**INTERVIEWER:** If respondent has an internet or telephone account but type of account is not known ask respondent what they predominantly use their account for to establish whether it is a current account or savings account.

See help screen for definitions of accounts.

- Current account with a bank, building society, supermarket/store or other organisation
- 2. Basic Bank Accounts including introductory/ starter accounts (including internet and telephone banking)
- 3. Post Office card accounts
- 4. National Savings Bank Direct Saver (including internet and telephone banking)
- 5. National Savings Bank Investment Account (including postal banking)
- 6. ISA (Individual Savings Account) (including internet and telephone banking)
- Savings account, investment account/bond, any other account with a bank, building society, supermarket/store or other organisation (including internet and telephone banking)
- 8. Credit Union
- 9. Internet or telephone banking type of account not known 40.9.None of these

### **Final Questions**

The Interviewer wording/order of wording to the SLC follow up question (**SLCFUp**) has been changed to improve the agreement to follow-up on the SLC.



As a token of thanks each adult respondent will receive a £10 voucher after completion of the follow-up study. Please inform the respondent that their contribution to the follow-up study is important and supported by DWP. It will help the Government understand how different sections of society are managing, so that it can plan for the future, assess the effects of policy changes and measure the state of the economy. As a token of thanks each adult respondent will receive a £10 voucher after completion of the follow-up study.

If the respondent has further queries about the follow-up study, which is called the Survey Of Living Conditions, they can contact the ONS Survey Enquiry Line on 0800 298 5313.

# **Changes to show cards**

Assume that show cards have remained the same since last year, unless otherwise mentioned.

2014-15	2015-16	ACTION
N/A	C3	New show card
	FreeCCTy	
F1 & F2	F1 & F2	Content changed
HiQual3	HiQual3	
CurQual	CurQual	
F3	F3 <b>Train</b>	Content changed
Train F5	F5	New show card
YJobLev	YJobLev	New Show Card
H6	H6	New show card – knocked
SocFund	CBChk	on numbers of other cards
		'H'
H6	H7	Number change
SocFund	SocFund	
H7	H8	Number change
OtherBen	OtherBen	<b>.</b>
H8	H9	Number change
ClaiFut H9	ClaiFut H10	Number shange
AccUc	AccUc	Number change
H10	H11	Number change
TCEver	TCEver	Trambor onlyings
K1	K1	Content change
AnyPen	AnyPen	
K2	K2	New show card – knocked
Royal	PenWealth	on numbers of other cards
1/0	140	'K'
K2	K3	Number change
Royal K3	Royal K4	Number shange
PropRent	PropRent	Number change
K4	K5	Number change
MntRec	MntRec	Trambor onlyings
K5	K6	Number change
MntArr	MntArr	
K6	K7	Number change
MrArr	MrArr	-
K7	K8	Number change
Allow	Allow	
K8	K9	Number change
OddJob N/A	OddJob EU1	New cards for Social and
IN/A	201	Cultural Participation
		questions
N/A	EU2	New cards for Social and
		Cultural Participation
	1	•
		questions  New cards for Social and

2014-15	2015-16	ACTION
		Cultural Participation questions
N/A	EU4	New cards for Social and Cultural Participation questions