

# **English Longitudinal Study of Ageing**

Wave One Questionnaire - 2002

ELSA Wave 1 Questionnaire - May 2002

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**Household Demographics Module**

**DhTimA**

Time at start of the Household Demographics Module (set by DhSameH)

*IF interviewing at an originally issued household: HHno = 1*

**DhSameH**

INTERVIEWER: ARE YOU INTERVIEWING AT THE ADDRESS GIVEN ON ARF LABEL?

- 1 Yes
- 2 No

ENDIF

**DHResp**

INTERVIEWER: Who will answer the Household questionnaire?

CODE ONE ONLY

*{Display's names of elsa sample members and young partners in Household (excluding those known to have died)}*

Range: 1..97

- 96 Other Household Member
- 97 Not a Household Member

CHECK: IF the number of the person answering the household questionnaire is not an elsa sample member or young partner AND is not 96 OR 97: (DHResp = RESPONSE AND DHResp <> 96 AND DHResp <> 97), INTERVIEWER: "This is not a valid person number! Please change!"

*IF other household member answering household questionnaire:*

*DHResp = 96*

**DhWho**

*{Display's names of other household members (excluding those known to have died)}*

INTERVIEWER: CODE WHO WILL ANSWER THE HOUSEHOLD QUESTIONNAIRE.

Range: 1..97

- 96 New member of household eligible for interview
- 97 New member of household not eligible for interview

CHECK: IF the number of the person answering the household questionnaire does not appear in the household grid and is not 96 OR 97: (DhWho = RESPONSE AND DhWho <> 96 AND DhWho <> 97), INTERVIEWER: "This is not a valid person number! Please change!"

ENDIF

*IF respondent is not household member OR is not new member of household eligible for interview: (DHResp = 97) OR (DhWho = RESPONSE AND DhWho <> 96)*

**DhWarn**

INTERVIEWER: THE HOUSEHOLD QUESTIONNAIRE SHOULD ONLY BE ANSWERED BY ^A NON-HOUSEHOLD MEMBER/A HOUSEHOLD MEMBER NOT ELIGIBLE FOR INTERVIEW IF ALL HOUSEHOLD MEMBERS ELIGIBLE FOR INTERVIEW ARE INCAPACITATED  
Press 1 and <Enter> to continue

ENDIF

**DHInt**

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This is a study about the Health and lifestyles of people aged 50 and over (and any partners under 50). I would like to begin by *collecting a few/checking our* details about who lives in this household.  
Press 1 and <Enter> to continue

Repeat questions DHName to DHMon: for each person in the household grid and Name to DhR for all new household member's

**DHName**

Does *name* *still* live here?

- 1 Yes
- 2 No

{set to 'Yes' for the person answering the household questionnaire, set to 'No' for people known to have died}

IF person still lives in household: DHName = 1

IF name information available from HSE: HSE.Name = RESPONSE

**DhNC**

INTERVIEWER: IS FIRST NAME (*Name*) CORRECT?

- 1 Yes
- 2 No

ELSE

**Name**

What is *your name/the first name of the first person/the first name of the next person*?

ENTER FIRST NAME

Text: up to 20 characters

ENDIF

IF name from HSE is incorrect: DhNC = 2

**DhNN**

INTERVIEWER: ENTER CORRECT FIRST NAME

Text: up to 20 characters

{if name from HSE is correct, DhNN = HSE.Name, if name from HSE was not available, DhNN = Name}

ENDIF

IF information regarding sex is available from HSE: HSE.SEX = RESPONSE

**DHSexC**

ASK OR CODE: Can I just check *you are/name* is *sex*?

- 1 Yes
- 2 No

ELSE

**Sex**

ASK OR CODE *name's* SEX

- 1 Male
- 2 Female

ENDIF

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IF sex from HSE is incorrect: DhSexC = 2

**DhSex**

ASK OR CODE ^Name's SEX

Text: up to 20 characters

{if sex from HSE is correct, DhSex = HSE.Sex, if sex from HSE was not available, DhSex = Sex}

ENDIF

IF information regarding date of birth is available from HSE: DOB = RESPONSE

**DHDoBC**

Can I just check ^name's date of birth is ^date of birth?

1 Yes

2 No

ENDIF

IF date of birth from HSE was incorrect or not available : DhDobC = 2 OR HSE.Dob <> RESPONSE

**DHDob**

What is ^your/^name's date of birth?

DATE

{if date of birth from HSE is correct, DhDob = HSE.DoB}

CHECK: IF date of birth is 1885 or earlier: (DHDob = RESPONSE AND YEAR(DHDob) < 1885), INTERVIEWER: "Are you sure? The year is earlier than 1885!"

CHECK: IF date of birth is after interview date: (Qinit.Intdat = RESPONSE AND Qinit.Intdat < DHDob), INTERVIEWER: "This date is in the future (^Date of Birth)! Please change!"

ENDIF

**DHOK (computed)**

Is this an eligible DoB - ie on or before 29th feb 1952

1 Yes

2 No

IF DhDob is not answered: DhDob <> RESPONSE

**DHAge**

What was ^name's age last birthday?

Range: 0..120

{if DhDob is answered, DhAge is computed from DhDob}

IF (DHAge = DK)

**DHEAg**

^Is name ... READ OUT ...

1 ... Under 16

2 16 to 29

3 30 to 49

4 50 to 69

5 70 to 89

6 or, 90 or over?

ENDIF

ENDIF

IF information regarding relationships is available from HSE:  
HSE.R = RESPONSE

DHRC

Is ^your/name's relationship to ^name ^relationship?

- 1 Yes
- 2 No

ENDIF

IF information regarding relationship is not available from HSE or  
relationship from HSE is not correct: HSE.R <> RESPONSE OR  
DHRC = No

DHR

SHOW CARD A

What is ^your/name's relationship to ^name? Please choose a  
number from this card.

- 1 Husband/Wife
- 2 Partner/cohabitee
- 3 Natural son/daughter
- 4 Adopted son/daughter
- 5 Foster son/daughter
- 6 Step son/daughter/child of partner
- 7 Son/daughter-in-law
- 8 Natural parent
- 9 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative
- 22 Other non-relative
- 96 Self (THIS CODE NOT USED)

[Don't know and Refusal not allowed]

{if relationship from HSE is correct, DhR = HSE.R}

CHECK: IF relationship is Self: DHR = 96, "Code 96 is not valid  
for this question."

CHECK: IF relationship is spouse/partner and age of person is  
less than 16: IF DHR = 1 OR 2 AND DHAge <= 15) OR DHEAg NOT =  
2,3,4,5,6, "Are you sure? ^name is only ^age. Please check."

IF relationship is parent (natural, adoptive, foster or step),  
parent-in-law OR grandparent and age of person is less than 16:  
(DHR = 8, 9, 10, 11, 12 OR 20) AND DHAge <= 15 OR DHEAg NOT =  
2,3,4,5,6, "You've coded ^name as a parent (inc. foster/in-  
law/step) or grandparent, but ^he/she is less than 16 years  
old. Please check ^name's age.

```
| |
| | ENDIF
| |
| ENDIF

| IF person not in household AND not known to have died before the interview:
| DHName = 2 AND Dead <> 1
|
| DHWhat
| May I ask what has happened to ^name?
| 1 Deceased
| 2 Living elsewhere - relationship ended
| 3 Living elsewhere - other reason
|
| ENDIF

| IF person was known to have died before the interview or has been recorded
| as dead during the interview: Dead = 1 OR DHWhat = 1
|
| DhDead
| ^We understand that ^name has died. May I ask when (he/she) died?/
| When did ^name die?"
| ENTER YEAR AT THIS QUESTION
| 1900..2050
|
| CHECK: IF year of death is before HSE interview: IF
| (HSE.QTP.P[Person].yintb = RESPONSE) AND (DhDead >=
| hse.qtp.p[Person].YIntB) AND (DhDead =< 1998), INTERVIEWER:
| "Individual was recorded as alive at HSE interview in ^year of
| HSE interview. Please check date of death."
|
| DhMon
| (When did ^name die?)
| ENTER MONTH AT THIS QUESTION
| 1 January
| 2 February
| 3 March
| 4 April
| 5 May
| 6 June
| 7 July
| 8 August
| 9 September
| 10 October
| 11 November
| 12 December
| 13 Winter (start of year)
| 14 Spring
| 15 Summer
| 16 Autumn
| 17 Winter (end of year)
|
| CHECK: IF month of death given is later than interview date:
| (Qinit.Intdat = RESPONSE AND Qinit.Intdat =<
| ((DhDead,ORD(DhMon)),1), INTERVIEWER: "This date is in the
| future (^Month of death ^Year of death)! Please change!"
|
| ENDIF
```

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**DHElse**

Does anyone else live here ^now?

1 Yes

2 No

[Don't Know and Refusal not allowed.]

{computed as = 'Yes' if respondent is a new houshold member}

{IF DhElse = 1, collects details for each new household member}

CHECK: IF any household member has more than one spouse/partner:  
P[P1].NumPart INVOLVINGP[P2].QRel[P1].DHR ^P[P1], INTERVIEWER: " ^Name has more than one spouse/cohabitee. Establish who is principal partner."

CHECK: IF any household member is married and spouse is of the same sex: ((P[P1].QRel[P2].DHR = spouse) AND (P[P1].DHSex = RESPONSE)) AND (P[P2].DHSex = RESPONSE) P[P1].DHSex INVOLVINGP[P1].QRel[P2].DHR, INTERVIEWER: "A married partner must be of opposite sex."

CHECK: IF any household member is cohabiting and cohabitee is of the same sex: (P[P1].QRel[P2].DHR = Part) P[P1].DHSex INVOLVINGP[P1].QRel[P2].DHR, INTERVIEWER: "A cohabiting partner is usually of opposite sex."

CHECK: IF any household member is reported as being a natural/adoptive/foster parent or grandparent and is less than 16 years old: P[P1].QRel[P2].DHR = 8,9,10,11,12,20 (P[P1].DHAge <= 15) INVOLVING (P[P1].QRel[P2].R,P[P1].DHAge), INTERVIEWER: "You've coded ^name as a parent (inc. foster/in-law/step) or grandparent, but he/she is less than 16 years old. Please check ^name's age."

CHECK: IF any household member is reported as being a natural/adoptive/foster parent or grandparent and is younger than the reported child/grandchild: (P[P1].QRel[P2].DHR =3,4,5,6,7,19 AND (P[P2].DHAge = RESPONSE) P[P1].DHAge INVOLVINGP[P1].QRel[P2].DHR, INTERVIEWER: "Children (inc.foster/in-law/step) and grandchildren should normally be younger than their parents/grandparents/step-parents. Please check the ages you have entered."

CHECK: IF any household member is reported as being a natural/adoptive/foster parent or grandparent and is younger than child/grandchild: (P[P1].QRel[P2].DHR IN 8,9,10,11,12,20 AND (P[P1].DHAge = RESPONSE)) P[P1].DHAge INVOLVINGP[P1].QRel[P2].DHR, INTERVIEWER: "Parents (inc. foster/in-law/step) or grandparents, are normally older than their child/grandchild/step-child. Please check the ages and relationships you've entered."

CHECK: IF more than two household members are reported as a particular child's parent: P[P1].QRel[P2].DHR IN 3,4,5,6,7 P[P1].NumParn = P[P1].NumParn + 1 IF P[P1].QRel[P2].DHR IN 3,4,5,6,7 P[P1].NumParn INVOLVINGP[P1].QRel[P2].DHR, INTERVIEWER: "This suggests that ^name has more than two parents. Please check the relationship codes for ^name and select which one to alter."

**DhTimB**

Time at start of children grid (set by DhCh)

DhCh to DHCR repeated for each single person/couple in household

**DhCh**

^Do you/Do you and ^name/Does ^name/Does ^name and ^name have any (other) living children?

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IF ASKED: Step, foster and adoptive children can be included  
1 Yes  
2 No

IF has any (other) living children: DhCh = 1

**DhNCh**

In total, how many (other) living children ^do you/^do you and ^name/^does ^name/^do name and name have?

IF ASKED: Step, foster and adoptive children can be included  
Range: 0..20

Repeat questions DhCNa to DhCAg for each child

**DhCNa**

What is the first name of ^your/his/her/their (^oldest/next) child?  
Text: up to 20 characters

**DhCS**

INTERVIEWER: CODE OR ASK ^name of child's SEX

- 1 Male
- 2 Female

**DhCDB**

What is ^name of child's date of birth?  
DATE

CHECK: IF child's date of birth is before parent's: (DhCDB = RESPONSE) AND IF (Dmdob[DhPA] = RESPONSE) DhCDB <= Dmdob[DhPA]), INTERVIEWER: "Child appears to be younger than parent. Please check. Child: ^name of child - ^date of birth of child Parent: ^name of parent - ^date of birth of parent."

CHECK: IF child's date of birth is later than interview date: (Qinit.Intdat = RESPONSE) (Qinit.Intdat >= DhCDB), INTERVIEWER: "This date is in the future (^child's date of birth)! Please change!"

IF does not know child's date of birth: DhCDB = DK

**DhCAg**

What was ^child's name's age last birthday?  
Range: 0..120

ENDIF

Repeat question DHCR for each eligible adult in grid

**DHCR**

SHOW CARD A

What is ^child's name's relationship to ^adult's name? Please choose a number from this card.

- 1 Husband/Wife
- 2 Partner/cohabitee
- 3 Natural son/daughter
- 4 Adopted son/daughter
- 5 Foster son/daughter
- 6 Step son/daughter/child of partner
- 7 Son/daughter-in-law
- 8 Natural parent
- 9 Adoptive parent

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| 10 Foster parent
| 11 Stepparent/parent's partner
| 12 Parent-in-law
| 13 Natural brother/sister
| 14 Half-brother/sister
| 15 Step-brother/sister
| 16 Adopted brother/sister
| 17 Foster brother/sister
| 18 Brother/sister-in-law
| 19 Grandchild
| 20 Grandparent
| 21 Other relative
| 22 Other non-relative
| 96 Self (THIS CODE NOT USED)
| [Don't know and Refusal are not allowed]
|
| CHECK: IF response is Self: DHCR[chloop] <> Self, INTERVIEWER:
| "THIS IS NOT A VALID CODE - PLEASE CHANGE!"
|
ENDIF

```

**DhTimC**

Time at end of children grid

**DHAnyPx**

INTERVIEWER: *^name(s) of eligible person(s) ^is/are ELIGIBLE FOR INTERVIEW. ^Do he/she/Do any/either of them NEED A PROXY INTERVIEW?*

- 1 Yes
- 2 No

*IF someone needs a proxy interview and there is more than one person eligible: DHAnyPx = 1 AND EligBT >= 2*

**DHProxy**

CODE PERSON NUMBERS OF ANY ELIGIBLE RESPONDENTS INCAPABLE OF INTERVIEW.

NOTE: THIS WILL GENERATE A Proxy INTERVIEW.

*^Name(s) of respondent(s) needing proxy interview  
{if only one person eligible set to that person}*

ENDIF

DHIAsep repeated for each couple in household

**DHIAsep**

Later in the interview, I would like to ask some questions about finances generally, for example income and savings. Can I just check, do *^you and ^name/does name and ^name* keep *^your/their* finances totally separate?

- 1 Yes
- 2 No

IF only 2 people eligible for interview

**DhNow**

INTERVIEWER: ARE YOU ABOUT TO BEGIN A CONCURRENT INTERVIEW WITH *^name* and *^name*?

THE ORDER IN WHICH RESPONDENTS WILL APPEAR IN THE SESSION WOULD BE: *^Name ^Name* (randomly in person number order or reverse person number order)

*(^INTERVIEWER: ^name and ^name HAVE SEPARATE FINANCES - BE SURE THEY ARE WILLING TO ANSWER QUESTIONS ABOUT THEIR FINANCES IN FRONT*

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OF EACH OTHER BEFORE INTERVIEWING THEM TOGETHER)

- 1 Yes
- 2 No

[Don't Know and Refusal are not allowed]

IF about to start a concurrent interview: DhNow = 1

**DhSurY**

INTERVIEWER: CODE 1 HERE TO CONFIRM THAT INDIVIDUAL SESSION ONE WILL BE A CONCURRENT INTERVIEW WITH ^name and ^name.

THE ORDER IN WHICH RESPONDENTS WILL APPEAR IN THE SESSION WILL BE: ^Name ^Name (randomly in person number order or reverse person number order)

NOTE: THIS CANNOT BE CHANGED

- 1 Correct
- 2 Not correct

[Don't Know and Refusal are not allowed]

ENDIF

ENDIF

IF is not about to start a concurrent interview or more than two people eligible for interview: DhNow <> 1

IF respondents hold shared finances: DHIasep = 2

DhIAWho repeated for all couples who are not about to be interviewed concurrently

**DHIAWho**

I will only need to ask one of ^you/them the questions about ^your/their finances. Which of ^you/them would be most able to answer these questions?

CODE ONE ONLY

- 1 ^name of respondent/first person in couple
- 2 ^name of second person in couple

[Don't Know and Refusal are not allowed]

ENDIF

**DHHou**

Some questions in the interview are about your household's housing and housing finances. I will only need to ask these to one person. Which of you would be the most able to answer questions about housing?

CODE ONE ONLY

{Display's names of all eligible respondents}

Range: 1..97

ENDIF

**Individual Demographics Module**

TIME

Time at beginning of cognitive screening (set by DiDob).

IF date of birth known: ^txtdob = respondent's date of birth.

IF respondent did not answer Household Demographics Module: QHD.HHresp IN [1..16] AND QHd.HHresp = allocp

**DiDob**

Can I just check, that your date of birth is ^txtdob?

- 1 Correct
- 2 Incorrect

IF date of birth is incorrect: DiDob = 2

**DiDBN**

What is your date of birth?

DATE

IF date of birth is not known: DiDBN = DK

**DiAg**

What was your age last birthday?

Range: 0..120

ENDIF

ENDIF

ENDIF

**DiInt\*\***

Who is completing the proxy for ^respondent's name?

Range: 1..97

IF proxy does not appear in Household grid: DiInt NOT IN [1..16]

**DiPre\*\***

SHOW CARD A

I'd like to ask you some questions about you. What is ^respondent's name relationship to ^him/her?

- 1 Husband/Wife
- 2 Partner/cohabitee
- 3 Natural son/daughter
- 4 Adopted son/daughter
- 5 Foster son/daughter
- 6 Step son/daughter/child of partner
- 7 Son/daughter-in-law
- 8 Natural parent
- 9 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law

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| 19 Grandchild
| 20 Grandparent
| 21 Other relative
| 22 Other non-relative
| 96 Self
| [don't know not allowed, refusal not allowed]
|
| CHECK: IF response regarding relationship is Self: DiPre = 96,
| INTERVIEWER: "THIS IS NOT A VALID CODE. PLEASE CHANGE!"
|
| ENDF
```

**DiSex**

ASK OR CODE ^respondent's name's SEX

- 1 Male
- 2 Female

**DiMar\***

SHOW CARD B

What is your current legal marital status?

- 1 Single, that is never married
- 2 Married, first and only marriage
- 3 Remarried, second or later marriage
- 4 Legally separated
- 5 Divorced
- 6 Widowed

CHECK: IF reports not married but married in household grid: (DiMar = 1, 4, 5 OR 6) AND Icouple = married, INTERVIEWER: "Are you sure? Respondent is recorded in HH Grid as having a husband/wife."

NEW BLOCK

**DiFint\***

I'd like to ask you a few questions about your family.

ENTER 1 AND CONTINUE

*IF has not reported living with grandchildren: IGCinHH <> Yes*

**DiGran\***

^Do you have any living grandchildren or great-grandchildren?

- 1 Yes
- 2 No

ENDIF

*IF have reported living with grandchildren OR reported having grandchildren or great-grandchildren: IGCinhh = Yes OR DiGran = 1*

**DiGnMy\***

How many living grandchildren or great-grandchildren do you have?

Range: 1..97

CHECK: IF reports number of living grandchildren or great-grandchildren larger than 20: DiGnMy > 20, INTERVIEWER: "Number of grandchildren or great-grandchildren seems high. Are you sure?"

ENDIF

**DiSib\***

How many living brothers or sisters do you have?

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IF ASKED: FOSTER/ADOPTIVE/STEP-BROTHERS/SISTERS CAN BE INCLUDED  
Range: 0..97

CHECK: IF reports number of living brothers or sisters larger than 12:  
DiSib > 12, INTERVIEWER: "*^Number of siblings seems high. Are you sure?*"

*IF respondent's mother was alive at HSE interview AND mother not living in household at present: HSE.LiveMaB = Yes AND IMainHH = No*

**DiNMA\***

Is your natural mother still alive?

- 1 Yes
- 2 No

*IF respondent's mother is still alive: DiNMA = 1*

**DiANM\***

How old is your natural mother?

Range: 16..120

CHECK: IF response regarding mother's age at DiANM is less than 50:  
DiANM < 50, INTERVIEWER: "The respondents' mother seems young. Please check."

CHECK: IF the difference between mother's age and respondent's age is less than 16 years: DiANM - IAgeof < 16, INTERVIEWER: "The respondents' mother's age seems low (*^mother's age*) relative to the age of the respondent (*^respondent's age*). Please check."

CHECK: IF respondent is older than his/her mother: DiANM < Iageof,  
INTERVIEWER: "This is younger than *^respondent's name* now! Please check!"

ENDIF

ENDIF

*IF reports mother dead at HSE interview but did not provide valid report for mother's age at death OR reports mother died since HSE interview: (HSE.LiveMaB = NO AND HSE.AgeMaB <> VALID RESPONSE) OR (DiNMA = 2)*

IF reports mother died since HSE interview: DiNMA = 2, *^ditxt3h* = How old was your natural mother.

ELSEIF reported mother dead at HSE but did not provide valid report of mother's age at death: HSE.LiveMaB = No AND HSE.AgeMaB <> VALID RESPONSE, *^ditxt3h* = Last time we interviewed you, you told us that your natural mother had died, can I just check, how old was she

**DiMAD\***

*^ditxt3h* when she died?

IF DOESN'T KNOW EXACT AGE, ASK FOR AN ESTIMATE

Range: 0..120

ENDIF

*IF Mother is not alive: HSE.LiveMaB = No OR DiNMA = 2*

IF reports mother died since HSE interview: DiNMA = 2, *^ditxt3* = Did your natural mother.

ELSEIF reported mother dead at HSE: HSE.LiveMaB = No AND HSE.AgeMaB <> RESPONSE, *^ditxt3* = Did she.

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ELSE ^ditxt3 = Last time we interviewed you, you told us that your natural mother had died, can I just check, did she

**DiCDNM\***

SHOW CARD C

^ditxt3 die from any of the conditions on this card?

CODE ONE ONLY

- 1 Cancer
- 2 Heart Attack
- 3 Stroke
- 4 Other cardiovascular related illness
- 5 Respiratory disease
- 96 None of these

ENDIF

IF respondent's father was alive at HSE interview AND father not living in household at present: HSE.LivePaB = Yes AND IPainHH = No

**DiNFA\***

Is your natural father still alive?

- 1 Yes
- 2 No

IF respondent's father is still alive: DiNFA = 1

**DiANF\***

How old is your natural father?

Range: 16..120

CHECK: IF response regarding father's age at DiANF is less than 50: DiANF < 50, INTERVIEWER: "The respondents' father seems young. Please check."

CHECK: IF the difference between father's age and respondent's age is less than 16 years: DiANF - IAgeof < 16, INTERVIEWER: "The respondents' father's age seems low (^father's age) relative to the age of the respondent (^respondent's age). Please check."

CHECK: IF respondent is older than his/her father: DiANF < Iageof, INTERVIEWER: "This is younger than ^respondent's name now! Please check!"

ENDIF

ENDIF

IF reports father dead at HSE interview but did not report father's age at death OR reports father died since HSE interview: (HSE.LivePaB = NO AND HSE.AgePaB <> RESPONSE) OR (DiNFA = 2)

IF reports father died since HSE interview: DiNFA = 2, ^ditxt3h = How old was your natural father.

ELSEIF reported father dead at HSE but did not report father's age at death: HSE.LivePaB = No AND HSE.AgePaB <> RESPONSE, ^ditxt3h = Last time we interviewed you, you told us that your natural father had died, can I just check, how old was he

**DiFAD\***

^ditxt3h when he died?

IF DOESN'T KNOW EXACT AGE, ASK FOR AN ESTIMATE

| Range: 0..120  
|  
| ENDIF

| IF Father is not alive: HSE.LivePaB = No OR DiNFA = 2

| IF reports father died since HSE interview: DiNFA = 2, ^ditxt3 = Did  
| your natural father.  
| ELSEIF reported father dead at HSE but did not report father's age at  
| death: HSE.LivePaB = No AND HSE.AgePaB <> RESPONSE, ^ditxt3 = Did he.  
| ELSE ^ditxt3 = Last time we interviewed you, you told us that your  
| natural father had died, can I just check, did he

| **DiCDNF\***

| SHOW CARD C

| ^ditxt3 die from any of the conditions on this card?

| CODE ONE ONLY

- | 1 Cancer
- | 2 Heart Attack
- | 3 Stroke
- | 4 Other cardiovascular related illness
- | 5 Respiratory disease
- | 96 None of these

| ENDIF

| **DiKLiv\***

| Who did you live with for most of your childhood?

- | 1 Both natural parents
- | 2 Natural mother and step-father
- | 3 Natural father and step-mother
- | 4 Natural mother
- | 5 Natural father
- | 6 Step-parents
- | 7 Foster Parents
- | 8 Adoptive parents
- | 9 Children's Home
- | 95 Other (specify)

| IF reports that has lived with other people: DiKLiv = 95

| **DiKLO**

| INTERVIEWER: WRITE IN WHO RESPONDENT LIVED WITH

| Text: up to 20 characters

| ENDIF

| IF did not live in children's home for most of their childhood: DiKLiv = 1,  
| 2, 3, 4, 5, 6, 7, 8 OR 95

| IF lived with both natural parents: DiKLiv = 1, ^fjobtxt = father`s.  
| ELSEIF lived with natural mother and step-father: DiKLiv = 2, ^fjobtxt =  
| step-father`s.  
| ELSEIF lived with natural father and step-mother: DiKLiv = 3, ^fjobtxt =  
| father`s.  
| ELSEIF lived with natural mother only: DiKLiv = 4, ^fjobtxt = mother`s.  
| ELSEIF lived with natural father only: DiKLiv = 5, ^fjobtxt = father`s.  
| ELSEIF lived with step-parents: DiKLiv = 6, ^fjobtxt = step-father`s.  
| ELSEIF lived with foster parents: DiKLiv = 7, ^fjobtxt = foster father`s.  
| ELSEIF lived with adoptive parents: DiKLiv = 8, ^fjobtxt = adoptive  
| father`s.

ELSE ^fjobtxt = main carer`s

**DiFJob\***

What was your ^fjobtxt main occupation when you were 14?

- 1 Armed forces
- 2 Manager or senior official in someone else's business
- 3 Running his own business
- 4 Professional or technical
- 5 Administrative, clerical or secretarial
- 6 Skilled trade
- 7 Caring, leisure, travel or personal services
- 8 Sales or customer service
- 9 Plant, process or machine drivers or operators
- 10 Other jobs
- 11 Something else
- 12 Casual jobs
- 13 Retired
- 14 Unemployed
- 15 Sick / disabled

*ENDIF*

**Health Module**

HeTimATime at start of general health section (set by Hegenh/Hehelf/HeIll)  
TIME

*IF randomisation allocates first general health option: HERan = 1*

**Hegenh**

How is your health in general? Would you say it was ...READ OUT...

- 1 Very good,
- 2 good,
- 3 fair,
- 4 bad,
- 5 or, very bad?

*ELSE*

**Hehelf**

Would you say your health is ... READ OUT ...

- 1 excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

*ENDIF*

**Heill\***

Do you have any long-standing illness, disability or infirmity? By long-standing I mean anything that has troubled you over a period of time, or that is likely to affect you over a period of time?

- 1 Yes
- 2 No

*IF has a long-standing illness: Heill = 1*

**Helim\***

(Does this / Do these) illness(es) or disability(ies) limit your activities in any way?

- 1 Yes
- 2 No

*ENDIF*

**HeFInt**

The next questions ask about difficulties you may have walking a quarter of a mile because of a health problem. By health problem we mean any long-term physical, mental or emotional problem or illness.

ENTER 1 AND CONTINUE

**HeFunc**

By yourself and without using any special equipment, how much difficulty do you have walking for a quarter of a mile? Do you have ...READ OUT...

- 1 no difficulty,
- 2 some difficulty,
- 3 much difficulty?
- 4 or, are you unable to do this?

*IF reports some or much difficulty walking quarter of a mile or unable to walk quarter of a mile: HeFunc = 2, 3 or 4*

|

IF spontaneously reports unable to walk quarter of a mile: HeFunc = 4,  
^difftxt = prevent you from AND ^difftxt1 = prevents you from walking.  
ELSE, ^difftxt = cause you to have difficulty AND ^difftxt1 = makes it  
difficult for you to walk

**HeAtt**

SHOW CARD D

What are the symptoms that ^difftxt walking a quarter of a mile?

INTERVIEWER PROBE : What others?

CODE ALL THAT APPLY

- 1 Chest pain
- 2 Fatigue/too tired
- 3 Shortness of breath
- 4 Tremor(s)
- 5 Pain in leg or foot
- 6 Swelling in leg or foot
- 7 Incontinence or fear of incontinence
- 8 Seeing difficulty
- 9 Hearing difficulty
- 10 Confusion
- 11 Difficulty concentrating
- 12 Memory problems
- 13 Unsteady on feet or balance problems
- 14 Lightheaded or dizziness
- 15 Fear of falling
- 16 Anxiety or fear
- 95 Some other problem or symptom

*IF reports more than one symptom causing difficulty or preventing from  
walking a quarter of a mile: HeAtt > 1*

**HeAta**

SHOW CARD D

And which of these is the main symptom that ^difftxt1 a quarter of a  
mile?

- 1 Chest pain
- 2 Fatigue/too tired
- 3 Shortness of breath
- 4 Tremor(s)
- 5 Pain in leg or foot
- 6 Swelling in leg or foot
- 7 Incontinence or fear of incontinence
- 8 Seeing difficulty
- 9 Hearing difficulty
- 10 Confusion
- 11 Difficulty concentrating
- 12 Memory problems
- 13 Unsteady on feet or balance problems
- 14 Lightheaded or dizziness
- 15 Fear of falling
- 16 Anxiety or fear
- 95 Some other problem or symptom

CHECK: IF response at HeAta did not appear at HeAtt INTERVIEWER:  
This reason wasn't given at HeATT. Please change!

ENDIF

ENDIF

NEW BLOCK

HeTimBTime at start of eyesight and hearing section (set by Heeye)  
TIME

**Heeye\***

Is your eyesight (using glasses or corrective lens as usual) ... READ OUT...

- 1 excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?
- 6 SPONTANEOUS registered or legally blind

*IF not registered or legally blind: Heeye = 1, 2, 3, 4 or 5*

**Hefrnd**

How good is your eyesight for seeing things at a distance, like recognising a friend across the street (using glasses or corrective lens as usual)? Would you say it is ... READ OUT ...

- 1 excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

**Hepap**

How good is your eyesight for seeing things up close, like reading ordinary newspaper print (using glasses or corrective lens as usual)? Would you say it is ... READ OUT ...

- 1 excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

*ENDIF*

**Heopt\***

Has a doctor or optician ever told you that you have (or have had) ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

INCLUDE DIABETIC RETINOPATHY IN CODE 2  
INCLUDE AGE RELATED MACULOPATHY IN CODE 3

- 1 Glaucoma or suspected glaucoma?
- 2 diabetic eye disease?
- 3 macular degeneration?
- 4 cataracts?
- 96 None of these [exclusive code]

*IF has ever been told has cataracts: Heopt = 4*

**Hecat\***

Have you ever had cataract surgery?

- 1 Yes
- 2 No

*ENDIF*

**Hehear\***

Is your hearing (using a hearing aid as usual) ...READ OUT...

- 1 excellent,
- 2 very good,

- 3 good,
- 4 fair,
- 5 or, poor?

**HeHra**

Do you find it difficult to follow a conversation if there is background noise, such as TV, radio or children playing (using a hearing aid as usual)?o

- 1 Yes
- 2 No

**NEW BLOCK**

HeTimCTime at start of CVD section (set by HeDiaa)  
TIME

**HeDiaa\***

SHOW CARD E

Has a doctor ever told you that you have (or have had) any of the conditions on this card?

PROBE : What others?

CODE ALL THAT APPLY

- 1 High blood pressure or hypertension
- 2 Angina
- 3 A heart attack (including myocardial infarction or coronary thrombosis)
- 4 Congestive heart failure
- 5 A heart murmur
- 6 An abnormal heart rhythm
- 7 Diabetes or high blood sugar
- 8 A stroke (cerebral vascular disease)
- 95 Any other heart trouble (SPECIFY)
- 96 None of these [exclusive code]

IF has or has had any other heart trouble: HeDiaa = 95

| **HEDiX\***

| INTERVIEWER: ENTER NAME OF OTHER HEART CONDITION

| Text: up to 30 characters

ENDIF

IF has or has had high blood pressure: HeDiaa = 1

| **Hemda\***

| Are you currently taking any medicines, tablets or pills for high blood pressure?

- | 1 Yes
- | 2 No

ENDIF

*IF has ever had angina diagnoses and angina not reported at HSE or age of diagnosis as reported at HSE not between 35 and 120: HSE.Ageangi NOT IN [35..120] AND HeDiaa = 2*

| **HeAga\***

| Approximately how old were you when you were first told by a doctor that you had angina?

| ENTER AGE IN YEARS

| Range: 0..110

CHECK: IF respondent's age is less than reported age of angina diagnosis: HeAga <= IageOf, INTERVIEWER: ^respondent's name is only ^respondent's age now! Please change!

CHECK: IF reported age of angina diagnoses less than 35: HeAga < 35, INTERVIEWER: This seems young ^reported age of angina diagnoses, can I check?

**ENDIF**

IF has ever had angina diagnosis: HeDiaa = 2

**HeYRa**

In the last two years, have you had any angina or chest pains due to your heart?

- 1 Yes
- 2 No

**ENDIF**

IF has ever had heart attack diagnoses and age of diagnosis as reported at HSE not between 35 and 120: HSE.AgeHart NOT IN [35..120] AND HeDiaa = 3

**HeAgb\***

Approximately how old were you when you were first told by a doctor that you had a heart attack (including myocardial infarction or coronary thrombosis)?

ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of heart attack diagnosis: HeAgb <= IageOf, INTERVIEWER: ^respondent's name is only ^respondent's age now! Please change!

CHECK: IF reported age of heart attack diagnoses less than 35: HeAgb < 35, INTERVIEWER: This seems young ^reported age of heart attack diagnoses, can I check?

**ENDIF**

IF has ever had heart attack diagnosis: HeDiaa = 3

**HeYRb\***

In the past two years, have you had a heart attack or myocardial infarction?

- 1 Yes
- 2 No

**ENDIF**

IF has ever had congestive heart failure diagnosis: HeDiaa = 4

**HeAgc\***

Approximately how old were you when you were first told by a doctor that you had congestive heart failure?

ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of congestive heart failure diagnosis: HeAgc <= IageOf, INTERVIEWER: ^respondent's name

| is only ^respondent's age now! Please change!

| CHECK: IF reported age of congestive heart failure diagnoses less than  
| 35: HeAgc < 35, INTERVIEWER: This seems young ^reported age of congestive  
| heart failure diagnoses, can I check?

ENDIF

IF has ever had diabetes diagnoses and age of diagnosis not given at HSE:  
HSE.Agedi <> RESPONSE AND HeDiaa = 7

| **HeAgd\***

| Approximately how old were you when you were first told by a doctor that  
| you had a diabetes or high blood sugar?

| ENTER AGE IN YEARS

| Range: 0..110

| CHECK: IF respondent's age is less than reported age of heart attack  
| diagnosis: HeAgb <= IageOf, INTERVIEWER: ^respondent's name is only  
| ^respondent's age now! Please change!

ENDIF

IF has ever had diabetes diagnosis: HeDiaa = 7

| **HeIns\***

| Do you currently inject insulin for diabetes?

| 1 Yes

| 2 No

| **HeMdb\***

| Are you currently taking any tablets, pills or other medicines that you  
| swallow for diabetes?

| 1 Yes

| 2 No

ENDIF

IF has ever had a stroke diagnosed and age of diagnosis as reported at HSE  
not between 35 and 120: HSE.Agestro NOT IN [35..120] AND HeDiaa = 8

| **HeAge\***

| Approximately how old were you when you were first told by a doctor that  
| you had a stroke?

| ENTER AGE IN YEARS

| Range: 0..110

| CHECK: IF respondent's age is less than reported age of stroke  
| diagnosis: HeAge <= IageOf, INTERVIEWER: ^respondent's name is only  
| ^respondent's age now! Please change!

| CHECK: IF reported age of stroke diagnoses less than 35: HeAge < 35,  
| INTERVIEWER: This seems young ^reported age of stroke diagnoses, can I  
| check?

ENDIF

IF has ever had stroke diagnosis: HeDiaa = 8

| **HePbs\***

| Do you have any remaining problems because of your stroke(s)?

- 1 Yes
- 2 No

IF has remaining problems because of a stroke: HePbs = 1

**HeWks\***

Do you have weakness in your arms and legs, or decreased ability to move or use them?

- 1 Yes
- 2 No

**HeSpk\***

Do you have any difficulty speaking or swallowing?

- 1 Yes
- 2 No

**HeVsi\***

Do you have any difficulty with your vision?

- 1 Yes
- 2 No

**HeThk\***

Do you have any difficulty in thinking or finding the right words to say?

- 1 Yes
- 2 No

ENDIF

ENDIF

**NEW BLOCK**

HeTimDTime at start of chronic illness section (set by HeDiab)  
TIME

**HeDiab\***

SHOW CARD F

Has a doctor ever told you that you have (or have had) any of the conditions on this card?

PROBE : What others?

CODE ALL THAT APPLY

- 1 Chronic lung disease such as chronic bronchitis or emphysema
- 2 Asthma
- 3 Arthritis (including osteoarthritis , or rheumatism)
- 4 Osteoporosis, sometimes called thin or brittle bones
- 5 Cancer or a malignant tumour (excluding minor skin cancers)
- 6 Parkinson's disease
- 7 Any emotional, nervous or psychiatric problems
- 8 Alzheimer's disease
- 9 Dementia, organic brain syndrome, senility or any other serious memory impairment
- 96 None of these [exclusive code]

IF has ever had a chronic lung disease diagnosis: HeDiab = 1

**HeLng\***

Are you taking medication or other treatment for your lung condition?

- 1 Yes
- 2 No

ENDIF

IF has ever had an asthma diagnosis: HeDiab = 2

**HeAma\***

Are you taking medication or other treatment for your asthma?

- 1 Yes
- 2 No

ENDIF

IF has ever had an arthritis diagnosis: HeDiab = 3

**HeArt\***

Which type or types of arthritis do you have ... READ OUT EACH IN TURN  
AND CODE ALL THAT APPLY ...

- 1 osteoarthritis?
- 2 rheumatoid arthritis?
- 3 some other kind of arthritis?

**HeAgf\***

Approximately how old were you when you were first told by a doctor that  
you had arthritis?

ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of arthritis  
diagnosis: HeAgf <= IageOf, INTERVIEWER: ^respondent's name is only  
^respondent's age now! Please change!

ENDIF

IF has ever had a cancer diagnosis: HeDiab = 5

**HeAgg\***

Approximately how old were you when you were first told by a doctor that  
you had cancer or a malignant tumour?

ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of cancer  
diagnosis: HeAgg <= IageOf, INTERVIEWER: ^respondent's name is only  
^respondent's age now! Please change!

CHECK: IF reported age of cancer diagnoses less than 35: HeAgg < 35,  
INTERVIEWER: This seems young ^reported age of cancer diagnoses, can I  
check?

**HeCana\***

SHOW CARD G

In which organ or part of your body did your (cancer/cancers/malignant  
tumour) start?

CODE ONE ONLY

- 1 Lung
- 2 Breast
- 3 Colon, bowel or rectum
- 4 Lymphoma
- 5 Leukaemia
- 6 Melanoma or other skin cancer
- 95 Somewhere else

**HeCanb\***

During the last two years have you received any treatment for your cancer?

- 1 Yes
- 2 No

ENDIF

IF has ever had a Parkinson's diagnosis: HeDiab = 6

**HePrk\***

Approximately how old were you when you were first told by a doctor that you had Parkinson's disease?

INTERVIEWER: ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of Parkinson's diagnosis: HePrk <= IageOf, INTERVIEWER: ^respondent's name is only ^respondent's age now! Please change!

CHECK: IF reported age of Parkinson's diagnoses less than 50: HePrk < 50, INTERVIEWER: This seems young ^reported age of Parkinson's diagnoses, can I check?

ENDIF

IF has ever had psychiatric problems diagnosed: HeDiab = 7

**HeAgh\***

Approximately how old were you when you were first told by a doctor that you had emotional, nervous or psychiatric problems?

ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of psychiatric diagnosis: HeAgh <= IageOf, INTERVIEWER: ^respondent's name is only ^respondent's age now! Please change!

**HePsy\***

SHOW CARD H

What type of emotional, nervous or psychiatric problems do/did you have?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Hallucinations
- 2 Anxiety
- 3 Depression
- 4 Emotional problems
- 5 Schizophrenia
- 6 Psychosis
- 7 Mood swings
- 8 Manic depression
- 95 Something else

**HeYrc\***

During the last two years have you had emotional, nervous or psychiatric problems?

- 1 Yes
- 2 No

ENDIF

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IF has ever had an Alzheimer's diagnosis: HeDiab = 8

**HeAgi\***

Approximately how old were you when you were first told by a doctor that you had Alzheimer's Disease?

ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of Parkinson's diagnosis: HeAgi <= IageOf, INTERVIEWER: ^respondent's name is only ^respondent's age now! Please change!

CHECK: IF reported age of Alzheimer's diagnoses less than 50: HeAgi < 50, INTERVIEWER: This seems young ^reported age of Alzheimer's diagnoses, can I check?

ENDIF

IF has ever had a dementia diagnosis: HeDiab = 9

**HeAgj\***

Approximately how old were you when you were first told by a doctor that you had dementia, senility or any other serious memory impairment?

ENTER AGE IN YEARS

Range: 0..110

CHECK: IF respondent's age is less than reported age of dementia diagnosis: HeAgj <= IageOf, INTERVIEWER: ^respondent's name is only ^respondent's age now! Please change!

CHECK: IF reported age of dementia diagnoses less than 50: HeAgj < 50, INTERVIEWER: This seems young ^reported age of dementia diagnoses, can I check?

ENDIF

**NEW BLOCK**

HeTimDlTime at start of fallen section (set by HeFla)

TIME

IF respondent is 60 or older: AgeOf >= 60

**HeFla**

Have you fallen down in the last two years (for any reason)?

1 Yes

2 No

IF has fallen down in the last two years: HeFla = 1

**HeFlb**

How many times have you fallen down in the last two years?

Range: 0..400

**HeFlc**

In ^THAT fall/ANY of these falls, did you injure yourself seriously enough to need medical treatment?

1 Yes

2 No

ENDIF

**HeFrac**

Have you ever fractured your hip?

- 1 Yes
- 2 No

**HeJi\***

Have you ever had any joint replacements?

- 1 Yes
- 2 No

*IF has had a joint replacement: HeJi = 1*

**HeJia\***

Which joints did you have replaced?

PROBE : What others?

CODE ALL THAT APPLY

- 1 Hip
- 2 Both hips
- 3 Knee
- 4 Both knees
- 5 Hips(s) and knee(s)
- 6 Other joint

*IF one hip, both hips or hips and knees have been replaced: HeJia = 1,  
2 OR 5*

**HeJib\***

(Was/Were) the hip replacement(s) because of arthritis, a fracture or for some other reason?

- 1 arthritis
- 2 fracture
- 3 both arthritis and a fracture
- 95 other reason

**HeJic\***

Have you had a hip replacement in the last two years?

- 1 Yes
- 2 No

*ENDIF*

*ENDIF*

*ENDIF*

**NEW BLOCK**

HeTimPTime at start of proxy only section (set by Heiqa)

TIME

**Heiqa\*\***

SHOW CARD I

Now we want you to remember what *^respondent's name* was like two years ago and to compare it with what *^he/she* is like now. Two years ago was in 2000. I will read out situations where *^respondent's name* has to use *^his/her* memory or intelligence and we want you to indicate whether this has improved, stayed the same or got worse in that situation over the past two years. Note the importance of comparing *^respondent's name's* present performance with two years ago. So if two years ago *^respondent's name* always forgot where *^he/she* had left things, and *^he/she* still does, then

this would be considered 'Hasn't changed much'. Please indicate the changes you have observed giving the appropriate answer from the card.

- 1 Press 1 and enter to continue
- 2 Unable to answer - does not know what the person was like two years ago

*IF proxy informant able to answer: Heiqa = 1*

**Heiqb\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at remembering things about family and friends, like occupations, birthdays or addresses?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqc\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at remembering things that have happened recently?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqd\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at recalling conversations a few days later?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqe\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at remembering *^his/her* address and telephone number?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqf\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at remembering what day and month it is?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqg\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at remembering

where things are usually kept?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqh\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at remembering where to find things which have been put in a different place from usual?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqi\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at knowing how to work familiar machines around the house?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqj\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at learning to use a new gadget or machine around the house?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqk\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at learning new things in general?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiql\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at following a story in a book or on TV?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqm\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at making decisions on everyday matters?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqn\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at handling money for shopping?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqo\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at handling financial matters, like the pension or dealing with the bank?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqp\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at handling other everyday arithmetic problems, like knowing how much food to buy, or knowing how long between visits from family or friends?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**Heiqq\*\***

SHOW CARD I

Compared with two years ago, how is *^respondent's name* at using *^his/her* intelligence to understand what's going on and to reason things through?

- 1 Much improved
- 2 A bit improved
- 3 Not much change
- 4 A bit worse
- 5 Much worse

**ENDIF**

**NEW BLOCK**

HeTimeTime at start of pain section (set by HePain)  
TIME

**HePain**

Are you often troubled with pain?

- 1 Yes
- 2 No

*IF often troubled with pain: HePain = 1*

|

**HePaa**

How bad is the pain most of the time? Is it ...READ OUT...

- 1 mild,
- 2 moderate,
- 3 or, severe?

**HePab**

How would you rate your pain if you were walking on a flat surface?  
Please rate your pain from 0-10 for each of the following where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine.

- 1 Press 1 and enter to continue
- 2 Can't walk or never walks

*IF can walk: HePab = 1*

**HeBck**

(How would you rate the pain) in your back?  
PROMPT IF NECESSARY: Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine  
Range: 0..10

**HeHip**

(How would you rate the pain) in your hips?  
PROMPT IF NECESSARY: Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine  
Range: 0..10

**HeKne**

(How would you rate the pain) in your knees?  
PROMPT IF NECESSARY: Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine  
Range: 0..10

**HeFet**

(How would you rate the pain) in your feet?  
PROMPT IF NECESSARY: Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine  
Range: 0..10

*ENDIF*

**ENDIF**

*IF can walk: HePab <> 2*

**HeBal**

SHOW CARD J  
How often do you have problems with keeping your balance when you are walking on a level surface?

- 1 Always
- 2 Very often
- 3 Often
- 4 Sometimes
- 5 Never
- 6 SPONTANEOUS Never walks
- 7 SPONTANEOUS Can't walk

*IF can walk and does walk: HeBal <> 6 OR 7*

**HeDiz**

SHOW CARD J

How often do you have problems with dizziness when you are walking on a level surface?

- 1 Always
- 2 Very often
- 3 Often
- 4 Sometimes
- 5 Never
- 6 SPONTANEOUS Never walks
- 7 SPONTANEOUS Can't walk

ENDIF

ENDIF

NEW BLOCK

HeTimfTime at start of rose angina section (set by HeAnInt)  
TIME

**HeAnInt**

I am now going to ask you some questions mainly about symptoms of the chest.

ENTER 1 AND CONTINUE

**HeAna**

Have you ever had any pain or discomfort in your chest?

- 1 Yes
- 2 No

*IF has ever had pain or discomfort in chest: HeAna = 1*

**HeAnb**

Do you get it when you walk uphill or hurry?

- 1 Yes
- 2 No
- 3 Sometimes/Occasionally
- 4 Never walks uphill or hurries
- 5 Cannot walk

*IF gets pain or discomfort in chest when walks uphill or in a hurry sometimes or occasionally: HeAnb = 3*

**HeAnc**

Does this happen on most occasions?

- 1 Yes
- 2 No

ENDIF

*IF ever gets any pain or discomfort in chest when walks uphill in a hurry or never walks uphill in a hurry: HeAnb = 1, 3 OR 4*

**HeAnd**

Do you get it when you walk at an ordinary pace on the level?

- 1 Yes
- 2 No
- 3 Sometimes/Occasionally
- 4 Never walks at an ordinary pace on the level

*IF gets pain or discomfort in chest when walks at an ordinary pace on the level sometimes or occasionally: HeAnd = 3*

**HeAne**

Does this happen on most occasions?

- 1 Yes
- 2 No

ENDIF

ENDIF

*IF gets pain or discomfort in chest when walks at an ordinary pace on the level on most occasions or more often: HeAnd = 1 OR HeAne = 1*

**HeAnf**

What do you do if you get it while you are walking? Do you ...READ OUT...

- 1 Stop,
- 2 slow down,
- 3 or, do you carry on?

*IF stops or slows down: HeAnf = 1 OR 2*

**HeAng**

If you stand still does the pain go away or not?

IF RESPONDENT UNSURE, PROBE: What happens to the pain on most occasions?

- 1 Pain goes away
- 2 Pain doesn't go away

*IF the pain goes away when stops or slows down: HeAng = 1*

**HeAnh**

How soon does the pain go away? Does it go in ...READ OUT...

- 1 10 minutes or less,
- 2 or, more than 10 minutes?

*IF the pain goes away in 10 minutes or less: HeAnh = 1*

**HeAni**

Will you show me where you get this pain or discomfort?

USE CARD K TO HELP CODE THE POSITION OF THE PAIN OR DISCOMFORT

PROBE: Where else?

CODE ALL THAT APPLY

- 1 Sternum (upper or middle)
- 2 Sternum lower
- 3 Left anterior chest
- 4 Left arm
- 5 Right anterior chest
- 6 Right arm
- 95 Somewhere else

*IF the pain or discomfort is somewhere else: HeAni = 95*

**HEAnj**

Please could you tell me where you get this pain or discomfort?

WRITE IN

Text: up to 30 characters

ENDIF

ENDIF



**HeRpe**

Do you get short of breath walking with other people of your own age on level ground?

- 1 Yes
- 2 No
- 3 Never walks with people of own age on level ground
- 4 Cannot walk

*IF walks with people of own age: HeRpe = 1 OR 2*

**HeRpf**

Do you have to stop for breath when walking at your own pace on level ground?

- 1 Yes
- 2 No

*ENDIF*

*ENDIF*

**HeRpg**

Have you had attacks of wheezing or whistling in your chest at any time in the last 12 months?

- 1 Yes
- 2 No

**HeRph**

Have you at any time in the past 12 months been woken at night by an attack of shortness of breath?

- 1 Yes
- 2 No

**HeRpi**

Have you ever had attacks of shortness of breath with wheezing?

- 1 Yes
- 2 No

*IF has ever had attacks of shortness of breath with wheezing: HeRpi = 1*

**HeRpj**

Is/Was your breathing absolutely normal between attacks?

- 1 Yes
- 2 No

*ENDIF*

**NEW BLOCK**

HeTimhTime at start of claudication section (set by HeCda)

TIME

**HeCda**

Do you get pain or discomfort in either of your legs which comes on when you walk?

- 1 Yes
- 2 No
- 3 Cannot walk

*IF gets pain or discomfort in either leg when walks: HeCda = 1*

**HeCdb**

Does this pain ever begin when you are standing still or sitting?

- 1 Yes
- 2 No

**HeCdc**

Do you get it if you walk uphill or hurry?

- 1 Yes
- 2 No
- 3 Never walks uphill or hurries

**HeCdd**

Do you get it when you walk at an ordinary pace on the level?

- 1 Yes
- 2 No
- 3 Never walks at an ordinary pace on the level

**HeCde**

If you stand still does the pain usually ...READ OUT...

- 1 Continue for more than 10 minutes,
- 2 or, disappear in 10 minutes or less?

**HeCdf**

Where do you get this pain or discomfort? Is it in the ...READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

- 1 Calf muscle?
- 2 thigh or buttocks?
- 3 somewhere else?

ENDIF

**NEW BLOCK**

HeTimeTime at start of ADL section (set by HeAvoid)  
TIME

**HeAvoid**

When you go on a trip away from your home like a trip to the shop, restaurant, or visits to friends, how often do you purposely limit the amount of walking you have to do? Is it ... READ OUT ...

- 1 never,
- 2 rarely,
- 3 sometimes,
- 4 often,
- 5 or, always?
- 6 SPONTANEOUS Never takes trip away from home

**HeADLa**

SHOW CARD L

We need to understand difficulties people may have with various activities because of a health or physical problem. Please tell me whether you have any difficulty doing each of the everyday activities on this card. Exclude any difficulties that you expect to last less than three months.

Because of a health problem, do you have difficulty doing any of the activities on this card?

PROBE : What others? CODE ALL THAT APPLY

- 1 Walking 100 yards
- 2 Sitting for about two hours
- 3 Getting up from a chair after sitting for long periods
- 4 Climbing several flights of stairs without resting
- 5 Climbing one flight of stairs without resting
- 6 Stooping, kneeling, or crouching

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- 7 Reaching or extending your arms above shoulder level
- 8 Pulling or pushing large objects like a living room chair
- 9 Lifting or carrying weights over 10 pounds, like a heavy bag of groceries
- 10 Picking up a 5p coin from a table
- 96 None of these [exclusive code]

**HeADLb**

SHOW CARD M

Here are a few more everyday activities. Please tell me if you have any difficulty with these because of a physical, mental, emotional or memory problem. Again exclude any difficulties you expect to last less than three months.

Because of a health or memory problem, do you have difficulty doing any of the activities on this card?

PROBE : What others? CODE ALL THAT APPLY

- 1 Dressing, including putting on shoes and socks
- 2 Walking across a room
- 3 Bathing or showering
- 4 Eating, such as cutting up your food
- 5 Getting in or out of bed
- 6 Using the toilet, including getting up or down
- 7 Using a map to figure out how to get around in a strange place
- 8 Preparing a hot meal
- 9 Shopping for groceries
- 10 Making telephone calls
- 11 Taking medications
- 12 Doing work around the house or garden
- 13 Managing money, such as paying bills and keeping track of expenses
- 96 None of these [exclusive code]

*IF difficulty with any of the activities in the two lists above: (HeADLa = 1, 2, 3, 4, 5, 6, 7, 8, 9 OR 10) OR (HeADLb = 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12 OR 13)*

**HeHpa**

Thinking about the activities that you have problems with, does anyone ever help you with these activities (including your partner or other people in your household)?

- 1 Yes
- 2 No

*IF someone helps with daily activities: HeHpa = 1*

**HeHpb**

SHOW CARD N

Who helps you with these activities?

PROBE: Does anyone else help you with these activities?

CODE ALL THAT APPLY

- 1 Husband or wife or partner
- 2 Mother or father
- 3 son
- 4 Son-in-law
- 5 daughter
- 6 Daughter-in-law
- 7 sister
- 8 brother
- 9 Grandson
- 10 Granddaughter
- 11 Other relative
- 12 Unpaid volunteer

- 13 Privately paid employee
- 14 Social or health service worker
- 15 Friend or neighbour
- 16 Other person

**HeHpc**

Would you say that the help you receive ... READ OUT ...

- 1 meets your needs all the time,
- 2 usually meets your needs,
- 3 sometimes meets your needs,
- 4 or, hardly ever meets your needs?

ENDIF

**HeAid**

Do you use any of the following ... READ OUT AND CODE ALL THAT APPLY ...  
ONLY INCLUDE PERSONAL ALARMS USED TO CALL FOR ASSISTANCE AFTER FALLS ETC

- 1 a cane or walking stick?
- 2 a zimmer frame or walker?
- 3 a manual wheelchair?
- 4 an electric wheelchair?
- 5 a buggy or scooter?
- 6 special eating utensils?
- 7 a personal alarm?
- 96 None of these [exclusive code]

ENDIF

**HeInct**

This might not be easy to talk about, but we would like to ask you about incontinence. During the last 12 months, have you lost any amount of urine beyond your control?

- 1 Yes
- 2 No

**NEW BLOCK**

HeTimkTime at start of smoking section (set by HeSmk)  
TIME

**HeSmk**

Have you ever smoked cigarettes?

- 1 Yes
- 2 No

*IF has ever smoked cigarettes: HeSmk = 1*

**HESka**

Do you smoke cigarettes at all nowadays?

- 1 Yes
- 2 No

*IF smokes cigarettes at all nowadays: HESka = 1*

**HECig**

Do you smoke cigarettes or roll ups?

- 1 Cigarettes
- 2 Roll ups
- 3 Both cigarettes and roll-ups

*IF smokes cigarettes or cigarettes and roll-ups: HECig = 1 OR 3*

**HeSkb**

About how many cigarettes a day do you usually smoke on weekdays?  
IF RANGE GIVEN AND CAN'T ESTIMATE, ENTER MID-POINT.  
IF LESS THAN ONE A DAY, ENTER 0  
Range: 0..997

**HeSkc**

About how many cigarettes a day do you usually smoke at weekends?  
IF RANGE GIVEN AND CAN'T ESTIMATE, ENTER MID-POINT.  
IF LESS THAN ONE A DAY, ENTER 0  
Range: 0..997

CHECK: IF HeSkb >= 200, INTERVIEWER: This is more than 200 a day.  
Please change. IF HeSkb >= 60, INTERVIEWER: This seems high (*^# of cigarettes smoked on weekdays*). Please check

CHECK: IF HeSkc >= 200, INTERVIEWER: This is more than 200 a day.  
Please change. IF HeSkc >= 60, INTERVIEWER: This seems high  
(*^reported # of cigarettes smoked a day at weekends*). Please check

ENDIF

IF smokes roll-ups or both cigarettes and roll-ups: HECig = 2 OR 3

**HeTba**

How much tobacco do you normally smoke on a weekday?  
CODE HOW ANSWER GIVEN  
1 Grams  
2 Ounces

**HETbb**

(How much tobacco do you normally smoke on a weekday?)  
ENTER AMOUNT  
Range: 0..997

CHECK: IF HETbb >= 200, INTERVIEWER: This is more than 200 a day.  
Please change. IF HeTba = Ounces AND HETbb >= 4, INTERVIEWER: This  
seems high (*^reported amount of tobacco normally smoked on a  
weekday*). Please check. IF HeTba = Ounces AND HETbb >= 120,  
INTERVIEWER: This seems high (*^reported amount of tobacco normally  
smoked on a weekday*).

**HeTbc**

How much tobacco do you normally smoke a day at weekends?  
CODE HOW ANSWER GIVEN  
1 Grams  
2 Ounces

**HETbd**

(How much tobacco do you normally smoke a day at weekends?)  
ENTER AMOUNT  
Range: 0..997

CHECK: IF HETbd >= 200, INTERVIEWER: This is more than 200 a day.  
Please change. IF HeTbc = Ounces AND HETbd >= 4, INTERVIEWER: This  
seems high (*^reported amount of tobacco normally smoked a day at  
weekends*). Please check. IF HeTbc = Ounces AND HETbd >= 120,  
INTERVIEWER: This seems high (*^reported amount of tobacco normally  
smoked a day at weekends*).

```
| | ENDIF
| |
| | ENDIF
|
ENDIF
```

**NEW BLOCK**

HeTimLTime at start of alcohol section (set by HeAla)  
TIME

**HeAla**

In the past 12 months have you taken an alcoholic drink ...READ OUT...

- 1 twice a day or more,
- 2 daily or almost daily,
- 3 once or twice a week,
- 4 once or twice a month,
- 5 special occasions only,
- 6 or, not at all?

IF have drinking habits data from HSE

```
|
| HeAlb
| Since the last time we interviewed you ^date of HSE interview, have you
| changed your drinking habits?
| 1 Yes
| 2 No
```

*IF changed drinking habits since time of HSE interview: HeAlb = 1*

```
|
| HeAlc
| Do you now drink ...READ OUT...
| 1 a lot more,
| 2 a bit more,
| 3 a bit less,
| 4 or, a lot less?
```

```
| ENDIF
|
ENDIF
```

**NEW BLOCK**

HeTimMTime at start of physical activity section (set by HeActa)  
TIME

**HeActa**

SHOW CARD 0

We would like to know the type and amount of physical activity involved in your daily life. Do you take part in sports or activities that are vigorous ... READ OUT ...

- 1 more than once a week,
- 2 once a week,
- 3 one to three times a month,
- 4 hardly ever, or never?

**HeActb**

SHOW CARD 0

And do you take part in sports or activities that are moderately energetic ... READ OUT ...

- 1 more than once a week,

- 2 once a week,
- 3 one to three times a month,
- 4 hardly ever, or never?

**HeActc**

SHOW CARD 0

And do you take part in sports or activities that are mildly energetic ...  
READ OUT ...

- 1 more than once a week,
- 2 once a week,
- 3 one to three times a month,
- 4 hardly ever, or never?

*IF randomisation allocates first general health option: HERan = 1*

| **Hehelpb**

| Would you say your health is ... READ OUT ...

- | 1 excellent,
- | 2 very good,
- | 3 good,
- | 4 fair,
- | 5 or, poor?

*ELSE*

| **Hegenhb**

| How is your health in general? Would you say it was ...READ OUT...

- | 1 Very good,
- | 2 good,
- | 3 fair,
- | 4 bad,
- | 5 or, very bad?

ENDIF

**Social Participation**

TIME

Time at start of caring section (set by SPCAA)

**SPCAA**

Did you look after anyone in the past week (including your partner or other people in your household)?

BY 'LOOK AFTER' WE MEAN THE ACTIVE PROVISION OF CARE

- 1 Yes
- 2 No

*IF reports that they looked after anyone in the past week: SPCAA = 1*

**SPCAB**

What relation is this person or people to you?

CODE ALL THAT APPLY

- 1 Spouse or partner
- 2 Child
- 3 Grandchild
- 4 Parent
- 5 Parent in law
- 6 Other relative
- 7 Friend or neighbour
- 95 other

*IF they looked after someone other than those listed above: SPCAB = 95*

**SPCAX**

INTERVIEWER: ENTER DETAILS OF OTHER PERSON(S) WHO THEY CARED FOR

Text: up to 30 characters

ENDIF

**SPCAC**

How many hours in the past week did you do this?

ENTER NUMBER OF HOURS

IF 'ALL THE TIME', ENTER 168

Range: 0..168

ENDIF

**NEW BLOCK**

TIME

Time at start of cultural capital section (set by SpCin)

**SPCin**

SHOW CARD P

How often, if at all, do you go to the cinema?

- 1 Twice a month or more
- 2 About once a month
- 3 Every few months
- 4 About once or twice a year
- 5 Less than once a year
- 6 Never

*IF they only go to the cinema less than about once or twice a year, less than once a year or never: SPCin = 4, 5 or 6*

**SPCinB**

| Would you like to go to the cinema more often but feel that, for whatever  
| reason, you cannot?  
| 1 Yes  
| 2 No  
|  
*ENDIF*

**SPRest**

SHOW CARD P

How often, if at all, do you eat out of the house for example, in a restaurant, café or pub?

- 1 Twice a month or more
- 2 About once a month
- 3 Every few months
- 4 About once or twice a year
- 5 Less than once a year
- 6 Never

*IF they only eat out of the house about once or twice a year, less than once a year or never: SPRest = 4, 5 or 6*

| **SPRestB**  
| Would you like to eat out of the house more often but feel that, for  
| whatever reason, you cannot?  
| 1 Yes  
| 2 No  
|  
*ENDIF*

**SPMus**

SHOW CARD P

How often, if at all, do you visit an art gallery or museum?

- 1 Twice a month or more
- 2 About once a month
- 3 Every few months
- 4 About once or twice a year
- 5 Less than once a year
- 6 Never

*IF they visit an art gallery or museum about once or twice a year, less than once a year or never: SPMus = 4, 5 or 6*

| **SPMusB**  
| Would you like to visit an art gallery or museum more often but feel  
| that, for whatever reason, you cannot?  
| 1 Yes  
| 2 No  
|  
*ENDIF*

**SPTea**

SHOW CARD P

How often, if at all, do you go to the theatre, a concert or the opera?

- 1 Twice a month or more
- 2 About once a month
- 3 Every few months
- 4 About once or twice a year
- 5 Less than once a year
- 6 Never

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IF they go to the theatre, a concert or the opera about once or twice a year, less than once a year or never: SPTea = 4, 5 or 6

**SPTeaB**

Would you like to go to the theatre, a concert, or the opera more often out feel that, for whatever reason, you cannot?

- 1 Yes
- 2 No

ENDIF

**NEW BLOCK**

**SPCar**

Do you have use of a car or van when you need one (either as a passenger or driver)?

- 1 Yes
- 2 No

**SPTraA**

Do you use public transport ... READ OUT ...

- 1 a lot,
- 2 quite often,
- 3 sometimes,
- 4 rarely,
- 5 or, never?

IF they rarely or never use public transport: SPTraA = 4 or 5

**SPTraB**

Why don't you use public transport more often?

PROBE: What else?

CODE ALL THAT APPLY

- 1 Too expensive
- 2 Unreliable
- 3 Infrequent
- 4 My health prevents me
- 5 Do not need to
- 6 No public transport available
- 95 Other (specify)

If they don't use public transport for some other reason than those listed above: SPTraB = 95

**SPPubX**

INTERVIEWER: ENTER DETAILS OF OTHER REASONS

Text: up to 30 characters

ENDIF

ENDIF

**Measurement module**

TIME

Time at first section of walking speed module

*IF aged 60 or over: IAgeOF[mpno] >= 60*

**MmSchs**

INTERVIEWER: RECORD RESPONDENT STATUS

- 1 Observed walking without help of another person or using support
- 2 Observed walking with help of another person or using support
- 3 Not observed - in wheelchair
- 4 Not observed - bed bound
- 5 Not observed - uncertain if respondent has impairment

*IF interviewer has not observed respondent walking unaided: MmSchs = 2, 3, 4 OR 5*

**MmAlone**

I would like to test whether you can walk a very short distance comfortably. (Can I just check,) are you able to walk alone without holding on to another person (using a walking stick or other aid if necessary)?

- 1 Yes
- 2 Yes but aid unavailable
- 3 No

*ENDIF*

*IF interviewer has observed respondent walking unaided or respondent reports that she/he can walk unaided: MmSchs = 1 OR MmAlone = 1*

*IF interviewer has observed respondent walking unaided: MmSchs = 1, ^HSSTXT = I would now like to test whether you can walk a very short distance comfortably (using a walking stick or other aid if necessary).*

**MmHSS**

^HSSTXT

First, I would like to ask a few questions to check it is safe to carry out the test.

Do you have any problems from recent surgery, injury, or other health conditions that might prevent you from walking?

- 1 No apparent restriction
- 2 Yes, Recent surgery
- 3 Yes, Injury
- 4 Yes, Other health condition

*IF no apparent health restriction: MmHSS = 1*

**MmWill**

Are you willing to do the walking test?

- 1 Yes
- 2 No

*IF willing to do the walking test: MmWill = 1*

**MmSaf**

INTERVIEWER: DO YOU FEEL THAT IT IS SAFE TO CONTINUE WITH THE

```

| | | WALKING TEST?
| | | 1 Yes
| | | 2 No

```

```

| | | ENDIF

```

```

| | | ENDIF

```

```

| | | ENDIF

```

*IF recently had surgery, has an injury or other health condition that might prevent respondent from walking, doesn't know whether has such a condition or refused to answer this question, OR is not able to walk alone, walking aid is unavailable, does not know if can walk alone or refused to answer this question, OR interviewer does not feel it is safe to continue with the walking test or interviewer does not know if it is safe or refused to answer this question: (MmHSS = 2, 3, 4, DK OR RF) OR (MmAlone = 2, 3, DK OR RF) OR (MmSaf = 2, DK OR RF)*

**MMstop**

INTERVIEWER STOP TEST, FOR EXAMPLE SAYING: 'It would be safest to skip this test and move on to the next set of questions.  
ENTER 1 AND CONTINUE

```

| | | ENDIF

```

TIME

Time at second section of walking speed module

*IF willing to do walking speed test and interviewer thinks the test is safe: MmWill = 1 AND MmSaf = 1*

**MmAvsp**

INTERVIEWER: CHECK AVAILABILITY OF SUITABLE SPACE  
1 Suitable space available  
2 No suitable space

*IF suitable space is available: MmAvsp = 1*

**MmWala**

This is our walking course. I want you to walk to the other end of the course at your usual walking pace, just as if you were walking down the street to go to the shops. Walk all the way past the other end of the tape before you stop.

DEMONSTRATE THE WALK FOR THE RESPONDENT.

(I will walk with you.) Do you feel this would be safe?

```

1 Yes
2 No

```

*IF respondent feels walking speed test would be safe: MmWala = 1*

**MmStrt**

When I want you to start, I will say: 'Ready, begin.'

ASK THE RESPONDENT TO STAND WITH BOTH FEET TOGETHER AT THE START OF THE WALKING COURSE. WHEN THE RESPONDENT IS PROPERLY POSITIONED AT THE START OF THE WALKING COURSE, SAY: 'Ready, begin.'

PRESS THE START/STOP BUTTON TO START THE STOPWATCH AS THE RESPONDENT'S FOOT HITS THE FLOOR ACROSS THE STARTING LINE.

IF POSSIBLE WALK BEHIND AND TO THE SIDE OF THE RESPONDENT.  
STOP TIMING WHEN THE RESPONDENT'S FOOT HITS THE FLOOR AFTER  
THE END OF THE WALKING COURSE.  
ENTER 1 AND CONTINUE

**MmTrya**

INTERVIEWER : RECORD RESULTS OF FIRST TRIAL.

- 1 Completed successfully
- 2 Attempted but unable to complete
- 3 Stopped by the interviewer because of safety reasons
- 4 Respondent refused

*IF first walking speed test completed successfully: MmTrya =*  
*1*

**MMWlkA**

INTERVIEWER RECORD TIME IN SECONDS TO TWO DECIMAL PLACES  
Range: 0.00..997.00

**MmWalb**

Now I want you to repeat the walk. Remember to walk at your  
usual pace, and go all the way past the other end of the  
course.

ENTER 1 AND CONTINUE

**MmTryb**

INTERVIEWER: RECORD RESULT OF SECOND TRIAL. ENTER TIME AT  
NEXT QUESTION

- 1 Completed successfully
- 2 Attempted but unable to complete
- 3 Stopped by the interviewer because of safety reasons
- 4 Respondent refused

*IF second walking speed test completed successfully: MmTryb =*  
*1*

**MMWlkB**

INTERVIEWER : RECORD TIME IN SECONDS TO TWO DECIMAL PLACES  
Range: 0.00..997.00

ENDIF

ENDIF

ENDIF

ENDIF

ENDIF

TIME

Time at third section of walking speed module

*IF successfully completed first or second walking speed test:*  
*MmTryA = 1 OR MmTryB = 1*

**MmPain**

INTERVIEWER CODE IF RESPONDENT HAS COMMENTED ON PAIN, OTHERWISE  
ASK: Did you have pain while you were performing the walking  
test?

- 1 Yes

2 No

**MmRecR**

INTERVIEWER : RECORD TYPE OF FLOOR SURFACE.

- 1 Linoleum/tile/ wood
- 2 Low-pile carpet
- 3 Thick-pile carpet
- 4 Concrete
- 5 Others

*IF floor surface was not linoleum, tile, wood, carpet or concrete: MmRecR = 5*

**MMRecRO**

INTERVIEWER: ENTER OTHER TYPE OF FLOOR SURFACE

Text: up to 20 characters

ENDIF

**MmAid**

INTERVIEWER RECORD TYPE OF AID USED:

- 1 None
- 2 Walking stick or cane
- 3 Elbow crutches
- 4 Walking frame
- 5 Others

*IF a walking aid other than a stick, crutches or frame were used:  
MmAid = 5*

**MmAidO**

INTERVIEWER: ENTER OTHER TYPE OF AID USED

Text: up to 20 characters

ENDIF

ENDIF

*IF neither first or second walking speed test completed  
successfully: (MmTryA = 2, 3 OR 4) AND (MmTryB = 2, 3 OR 4)*

**MmCom**

INTERVIEWER: PROVIDE DETAILS ABOUT WHY THE WALKING TEST WAS NOT  
COMPLETED SUCCESSFULLY. I.E WHY IT WAS STOPPED FOR SAFETY  
REASONS, REFUSED, OR NOT COMPLETED

ENDIF

ENDIF

**Work and Pensions Module**

Start of WP (set by WpInt)  
TIME

**WpInt\***

Now I have some questions about work, retirement and pensions.  
ENTER 1 AND CONTINUE

**WpAct\***

SHOW CARD Q

Did you do any of these activities during the last month, that is since  
^date a month ago?

IF YES, PROBE: Which ones?

CODE ALL THAT APPLY

- 1 Paid work
- 2 Self-employment
- 3 Voluntary work
- 4 Cared for a sick or disabled adult
- 5 Looked after home or family
- 6 Attended a formal educational or training course
- 96 None of these [exclusive code]

*IF not in paid work or self-employment: WpAct = 3, 4, 5, 6, 96, DK OR REF*

**WpAway\***

Can I just check, at any point during the last month  
were you...READ OUT...

- 1 ... temporarily away from paid work,
- 2 looking for paid work,
- 3 or, waiting to take up paid work already accepted?
- 96 None of these

ENDIF

Derivation of WpActW: IF in paid work or self-employment: WpAct = 1 OR 2,  
WpActW = 1.

ELSEIF temporarily away from paid work: WpAway = 1, WpActW = 1.

ELSE waiting to take up paid work: WpAway = 3, WpActW = 3.

**WpActW\***

Derived - to give prioritised single coded version of the work variables in  
wpact

- 1 paidw
- 2 tempaway
- 3 waitwork

*IF temporarily away from paid work: WpActW = 2*

**WpTaw\***

What was the main reason you were away from work last month?

CODE ONE ONLY

- 1 Leave/holiday
- 2 Sick/injured
- 3 Attending a training course
- 4 Laid off/on short time
- 5 On strike
- 6 Maternity/Paternity leave
- 7 Other personal/family reasons
- 95 Other reasons (specify)

```

| IF away from work for other reason: WpTaw = 95
|
| WpTawo*
| INTERVIEWER WRITE IN OTHER REASON
| Text: up to 60 characters
|
| ENDIF
|
ENDIF

```

```

Wpdes*
SHOW CARD R
Which one of these, would you say best describes your current situation?
CODE ONE ONLY
1 Retired
2 Employed
3 Self-employed
4 Unemployed
5 Permanently sick or disabled
6 Looking after home or family
95 Other (specify)
96 SPONTANEOUS: Semi-retired

```

```

IF would describe situation in other way: Wpdes = 95
|
| Wpdesa*
| INTERVIEWER WRITE IN OTHER SITUATION
| Text: up to 60 characters
|
|
|
ENDIF

```

```

IF hasn't been on a educational or training course in last month: WpAct <>
6
|
| WpEdC
| Have you taken a formal educational or training course in the last
| 12 months?
| 1 Yes
| 2 No
|
|
|
ENDIF

```

```

WpVW
How often ^if at all do you do ^any voluntary work?Is it ... READ OUT ...
1 ... twice a month or more,
2 about once a month,
3 every few months,
4 about once or twice a year,
5 less than once a year,
6 or, never?

```

```

IF in paid work, temporarily away from paid work or waiting to take up paid
work: Wpactw = 1, 2 OR 3
|
| WpESP**
| ^Is/Will ^respondent's name ^be... READ OUT ...
| 1 ... an employee,
| 2 or, self-employed in ^hisher[pnum] main job?
|
|
|
ENDIF

```

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IF not in paid work, temporarily away from paid work, waiting to take up paid work: Wpactw <> 1, 2, 3

IF NOT in paid work, temporarily away from paid work OR waiting to take up paid work at time of HSE interview: HSE.Nactiv = 1, 3, 4, 6, 7, 8, 9, 10 OR 11

**Wpjob**

Can I just check, have you had a paid job since last time we interviewed you ^date of HSE interview?

JOB = PERIOD OF PAID WORK WITH AN EMPLOYER OR PERIOD OF CONTINUOUS SELF-EMPLOYMENT

- 1 Yes
- 2 No

ELSE in paid work, temporarily away from paid work OR waiting to take up paid work at the time of the HSE interview: HSE.Nactiv = 2 OR 5

**Wpjob1**

Last time we interviewed you ^in date of HSE interview, you were ^working/about to start work as a ^jobtitle from HSE.

Is this your most recent job?

JOB = PERIOD OF PAID WORK WITH AN EMPLOYER OR PERIOD OF CONTINUOUS SELF-EMPLOYMENT

- 1 Yes
- 2 No

ENDIF

ENDIF

IF in paid work or temporarily away from paid work AND in work or temporarily away from paid work or waiting to take up paid work at HSE: (WPActw = 1 OR 2) AND (HSE.Nactiv = 2 OR 5)

**Wpstj**

Last time we interviewed you, you were ^working/about to start work as a ^jobtitle from HSE, is this your main job?

JOB = PERIOD OF PAID WORK WITH AN EMPLOYER OR PERIOD OF CONTINUOUS SELF-EMPLOYMENT

IF MORE THAN ONE JOB, MAIN=JOB WITH MOST HOURS.

IF EQUAL HOURS: MAIN=HIGHEST PAID.

- 1 Yes
- 2 No

IF job at HSE is main job now AND was an employee at HSE: Wpstj = 1 AND HSE.employe = 1

**WpEmp**

Are you still working for the same employer?

- 1 Yes
- 2 No

ENDIF

ENDIF

IF not in paid work or temporarily away from paid work or waiting to take up paid work AND wasn't interviewed in person or didn't answer at HSE: (Wpactw NOT = 1, 2 OR 3) AND (HSE.Nactiv <> RESPONSE)

```

|
| Wpever
| Have you ever done any paid work?
| 1   Yes
| 2   No
|
ENDIF

```

IF in paid work or self-employed: WPActW = 1, ^wptxt2 = the main job you were doing last month.  
 ELSEIF if temporarily away: WPActW = 2, ^wptxt2 = the main job you were temporarily away from last month.  
 ELSEIF if waiting to take up paid work: WPActW = 3, ^wptxt2 = the main job you are waiting to take up.  
 ELSE if not currently working, temporarily away OR waiting to take up work ^wptxt2 = your last main job.

**WPAskD**  
 Computed : Ask WpJdo or not  
 1 Yes  
 2 No

**WPAskE**  
 Computed : Ask WpEst or not  
 1 Yes  
 2 No

**WPAskF**  
 Computed : Ask WpDet or not  
 1 Yes  
 2 No

Derivation of WpAskD, WpAskE, WpAskF:

WPAskD = 2  
 WPAskE = 2  
 WPAskF = 2

IF in paid work or temporarily away and was not interviewed or interviewed and not in work or waiting to take up work at time of HSE interview THEN WpAskD, WpAskE and WPAskF are set to 'Yes': WPActw = 1, 2, 3 AND (HSE.NActiv = 1 OR HSE.NACTIV = 3 OR HSE.NActiv = 4 OR HSE.NActiv = 6 OR NActiv = 7 OR HSE.NActiv = 8 OR HSE.NActiv = retire OR HSE.NActiv = 10 OR HSE.NActiv = 11 OR HSE.NActiv <> RESPONSE), THEN WPAskD = 1, WPAskE = 1, WPAskF = 1

IF currently waiting to take up work THEN WpAskD, WpAskE and WpAskF are set to 'Yes': WPActw = 3, THEN WPAskD = 1, WPAskE = 1, WPAskF = 1

IF not working/temporarily away/waiting to take up work at HSE and not currently working/temporarily away but has been working in between OR if working/temporarily away at HSE and not currently working/temporarily away but job at HSE was not most recent job OR working/temporarily away/waiting to take up work at HSE and currently working/temporarily away but not doing same job now as at HSE or if not currently working and not interviewed at HSE but has done paid work in the past THEN WpAskD, WpAskE and WPAskE are set to 'Yes': Wpjob = 1 OR Wpjob1 = 2 OR Wpstj = 2 OR Wpever = 2 THEN WPAskD = 1, WPAskE = 1, WPAskF = 1

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IF not working/temporarily away and job at HSE was last job or job at HSE is current main job and working for same employer OR if job at HSE is current main job and self-employed in this job but SOC code from HSE is missing, THEN WpAskD and WpAskE are set to 'Yes': (HSE.SOC <> RESPONSE) AND (Wpjob1 = 1 OR (Wpstj = 2 AND WpEmp = 1) OR (Wpstj = 1 AND (hse.employe <> EMPTY AND hse.employe <> 1))) THEN WPAskD = 1, WPAskE = 1

IF not working/temporarily away and job at HSE was last job or job at HSE is current main job and working for same employer OR if job at HSE is current main job and self-employed in this job but SOC code and jobtitle from HSE are missing, THEN WpAskF is set to 'Yes': (HSE.SOC <> RESPONSE AND HSE.Jobtitle <> RESPONSE) AND (Wpjob1 = 1 OR (Wpstj = 1 AND WpEmp = 1) OR (Wpstj = 1 AND (hse.employe <> EMPTY AND hse.employe <> 1))), WPAskF = 1

IF not currently working/temporarily away and not working/temporarily away/waiting to take up work at HSE and hasn't had a job at HSE and has worked in the past but SOC code for this job from HSE is missing THEN WpAskD, WpAskE and WpAskF are set to 'Yes': HSE.SOC <> RESPONSE AND Wpjob = 2 AND HSE.everjob = 1 THEN WPAskD = 1, WPAskE = 1, WPAskF = 1

IF currently working/temporarily away and was working/temporarily away/waiting to take up work at HSE and job from HSE is current main job AND IF still working for same employer OR if was self-employed in HSE job, THEN WpAskE is set to 'Yes': (Wpstj = 1) AND (WpEmp = 1 OR (hse.employe <> EMPTY AND hse.employe <> 1)), WPAskE = 1

IF currently working/temporarily away and was working/temporarily away/waiting to take up work at HSE and job from HSE is current main job AND not still working for same employer THEN WpAskD is set to 'Yes': Wpstj = 1 AND WpEmp = 2, THEN WPAskD = 1, WPAskE = 1

IF WPAskF = 1

**Wpdet**

I'd like to ask some details about ^wptxt2.

What is the name or title of this job?

JOB = PERIOD OF PAID WORK WITH AN EMPLOYER OR PERIOD OF CONTINUOUS SELF-EMPLOYMENT

IF MORE THAN ONE JOB, MAIN=JOB WITH MOST HOURS.

IF EQUAL HOURS: MAIN=HIGHEST PAID.

WRITE IN

Text: up to 60 characters

ENDIF

IF WPAskD = 1

**WpJDo**

What kind of work ^do/will/did you do most of the time?

IF RELEVANT: What materials / machinery ^do/will/did you use?

Text: up to 80 characters

**Wpqual**

What skills or qualifications are needed to do this job?

WRITE IN

Text: up to 120 characters

**WpSup**

^Do/Will/Did you directly supervise or ^are/were/will you ^be directly responsible for the work of any other people?

1 Yes

```

| 2    No
|
ENDIF

IF WPAskE = 1
|
| Wpest
| ^Are/will/were you ... READ OUT ...
| 1    ... an employee,
| 2    or, self-employed in your main job?
|
| IF an employee: Wpest = 1
|
|   Wpsal
|   Can I just check, ^are/were/will you ^be paid either a salary or wage
|   by an employer in your main job?
|   1    Yes
|   2    No
|
| ENDIF
|
| IF self-employed OR not paid a salary or wage by an employer:
| Wpest = 2 OR Wpsal = 2
|
|   WpCJb
|   (Can I just check) ^are/were/will you ^be... READ OUT EACH IN TURN AND
|   CODE ALL THAT APPLY (UP TO 4) ...
|   1    ... paid a salary or wage by an agency?
|   2    ... a sole Director of your own limited company?
|   3    ... running a business or professional practice?
|   4    ... a partner in a business or professional practice?
|   5    ... working for yourself?
|   6    ... a sub-contractor?
|   7    ... doing freelance work?
|   96   None of these [exclusive code]
|
| ENDIF
|
ENDIF

```

Derivation of WpES: IF WpEsP is answered, WpES = answer given at WpEsP.  
 IF paid a salary or wage by an agency, WpES is set to 'employee': WpCJb = 1, WpEs = 1.  
 ELSEIF a sole director of a limited company, running a business or professional practice, a partner in a business or professional practice or working for yourself, a subcontractor or doing free lance work, WpEs is set to 'self-employed': WpCJb = 2, 3, 4, 5, 6, OR 7, WpEs = 2.  
 ELSEIF said was an employee, WpEs is set to 'employee': Wpest = 1, WpEs = 1.  
 ELSEIF said was self-employed, WpEs is set to 'self-employed': Wpest = 2, WpEs = 2.  
 ELSE set to other response given at Wpest: Wpest = DK, WpEs = DK, Wpest = RF WpEs = RF.

**WpEs**

Derived  
 1 employ  
 2 semploy

IF WPAskD = 1

IF an employee: WpES = 2

**Wpmake**

What ^does/did your employer make or do at the place where you  
^wptxt4?

Text: up to 100 characters

**WpNEmp**

Including yourself, about how many people are employed at the  
place where you ^usually/will work(ed)?

- 1 1 or 2
- 2 3 to 24
- 3 25 to 499
- 4 500+

ENDIF

IF self-employed: WpES = 2

**Wpmaks**

What ^do/will/did you make or do in your business?

Text: up to 100 characters

**WpEmpl**

^Do/Will/Did you have any employees?

- 1 None
- 2 1 or 2
- 3 3 to 24
- 4 25 to 499
- 5 500+

ENDIF

ENDIF

IF in paid work or temporarily away AND an employee: (Wpactw = 1 OR 2) AND  
WpES = 1

**WpNoE**

Including yourself, about how many people, in total, work for your  
employer at all locations in the UK?

- 1 2-4
- 2 5-19
- 3 20-99
- 4 100-499
- 5 500-999
- 6 1000+

ENDIF

NEW BLOCK

IF in paid work or temporarily away: WpActW = 1 OR 2

**WpJAct**

SHOW CARD S

Which of these best describes the work that you do in your main  
job?

CODE ONE ONLY

- 1 Sedentary occupation: You spend most of your time sitting  
(such as in an office)

- 2 Standing occupation: You spend most of your time standing or walking. However the way you spend your time does not require intense physical effort (e.g. shop assistant, hairdresser, security guard etc.)
- 3 Physical work: This involves some physical effort including handling of heavy objects and use of tools (e.g. plumber, cleaner, nurse, sports instructor, electrician, carpenter etc.)
- 4 Heavy manual work: This involves very vigorous physical activity including handling of very heavy objects (e.g. docker, miner, bricklayer, construction worker etc.)

**WpsjobY**

When did you start your current job?

JOB=PERIOD OF PAID WORK WITH ONE EMPLOYER OR PERIOD OF CONTINUOUS SELF-EMPLOYMENT  
 ENTER YEAR AT THIS QUESTION  
 1900..2050

**WpsjobM**

(When did you start your current job?)

CODE MONTH AT THIS QUESTION  
 IF DOESN'T KNOW MONTH, CODE SEASON

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

CHECK: IF year started current job is later than year of interview: WpsjobY > Init.FWYear  
 "INTERVIEWER: This is later than ^2002! Please check!"

CHECK: IF year started current job is before respondent was 14:  
 WpsjobY - YEAR OF BIRTH < 14  
 "Check: This means that ^name of respondent was less than 14 when he/she started their current job. Please check."

CHECK: IF year and month started current job is later than date of interview: Qinit.Intdat >= ((WpsjobY,ORD(WpsjobM)),1))  
 "INTERVIEWER: This date is in the future (^month started job ^year started job)! Please change!"

IF an employee: WpES = 1

**WpCjob**

Is your current job ... READ OUT ...

- 1 ... a temporary job (lasting less than 12 months),
- 2 a fixed term job lasting between 1 and 3 years,

3 a fixed term job lasting more than 3 years,  
 4 or, a permanent job?

**WpHjob**

How many hours a week do you usually work in this job,  
 excluding meal breaks but including any paid overtime?  
 Range: 1..168

CHECK: IF works more than 70 hours per week: WpHjob > 70  
 "INTERVIEWER: That seems high (^number of hours worked per week), can I  
 check?"

ENDIF

IF self-employed: WpEs = 2

**WpHwrk**

How many hours a week do you usually work, including doing the  
 books, VAT and so on?  
 1..168

CHECK: IF works more than 70 hours per week: WpHjob > 70  
 "INTERVIEWER: That seems high (^number of hours worked per week), can I  
 check?"

ENDIF

ENDIF

IF not currently in paid work/temporarily away AND has had a job in the  
 past: (WpACTw NOT = 2 OR 3) AND WPJob <> No AND WPEver <> No

**WpWly**

Have you done any regular paid work in last 12 months, that is  
 since ^date a year ago?  
 1 Yes  
 2 No

ENDIF

IF in paid work OR temporarily away OR done regular paid work in last 12  
 months: Wpactw = 1 OR 2 OR WpWly = 1

**WpWlym**

How many weeks were you ^actively self-employed/in employment during the  
 last 12 months, that is since ^date a year ago ^including any other  
 periods of paid leave?  
 COUNT EACH WEEK RESPONDENT WAS IN EMPLOYMENT - EVEN IF ONLY WORKED FOR  
 PART OF THE WEEK  
 Range: 1..52

**WpHly**

How many weeks ^paid leave did you take in the last 12 months,  
 that is since ^date a year ago?  
 Range: 0..52

ENDIF

IF did regular paid work during the last 12 months (but not currently):  
 WpWly = 1

**WpWlyy**

About how much did your income from work amount to in the last year, including any overtime, bonuses, commissions, tips or tax refund, but before any deductions for tax, national insurance or pension contributions, union dues and so on?

Range: 0..999997

CHECK: IF earnings in last year were £100,000 or more: WpWlyy >= 100000 "INTERVIEWER: Are you sure? £ ^amount of earnings seems high - please check."

IF doesn't know/refuses to give earnings in last year: WpWlyy = DK OR WpWlyy = REF

**WpWlyb**

Did it amount to...

Brackets (5000,10000,20000,50000)

ENDIF

ENDIF

IF not in paid work or temporarily away AND has had a job: (WpActw <> 1, 2) AND (Wpever = 1 OR HSE.NActiv = 2 OR HSE.everjob = 1)

**Wp11jY**

When did your last job end?

JOB = PERIOD OF PAID WORK WITH AN EMPLOYER OR PERIOD OF CONTINUOUS SELF-EMPLOYMENT

ENTER YEAR AT THIS QUESTION

Range: 1900..2050

CHECK: IF year given is later than year of interview: Wp11jY >= QInit.FWYear "INTERVIEWER: This is later than ^2002! Please check!"

IF year job ended is after 1990: Wp11jY = RESPONSE AND Wp11jY > 1990

**Wp11jM**

(When did your last job end?)

CODE MONTH AT THIS QUESTION

IF DOESN'T KNOW MONTH, CODE SEASON

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

ENDIF

ENDIF

IF respondent is a male under 65 OR a female under 60: (isex = 1 AND agep < 65) OR (isex = 2 AND agep < 60)

**WpNIC**

Do you currently pay National Insurance contributions, including any that are paid on your behalf?

- 1 Yes
- 2 No

IF doesn't currently pay NI contributions: WpNIC = 2

**WpNICE**

Have you ever paid National Insurance contributions including any that have been paid on your behalf?

- 1 Yes
- 2 No

ENDIF

ENDIF

IF respondent is female and hasn't said that they've never been married: isex = 2 AND DiMar <> 1

**WpNImw**

Have you ever paid NI contributions at the reduced rate for married women.

This is sometimes known as the 'half stamp'?

- 1 Yes
- 2 No

ENDIF

IF in paid work or temporarily away: WpActW = 1 OR 2

**Wplnj**

Can I just check, are you currently looking for a new job?

- 1 Yes
- 2 No

ENDIF

NEW BLOCK

**WpTimB**

Pay starts here (set by Wpotp)

TIME

IF was temporarily away from work last month due to sickness and is an employee: WpTaw = 2 AND WpES = 1

**WpSpay\***

Can I just check are you currently receiving sick pay from an employer?

- 1 Yes
- 2 No

ENDIF

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IF in paid work/temporarily away and an employee: WpES = 1 AND Wpactw = 1  
OR 2

**Wpotp\***

How much are you paid including any overtime, bonuses, commissions, tips or tax refund, but before any deductions for tax, national insurance or pension contributions, union dues and so on?

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

IF period for gross pay was given: Wpotp = RESPONSE

**WpAotp\***

ENTER AMOUNT

ROUND TO NEAREST £

Range: 0..9999997

CHECK: IF period for gross pay is one week and amount given is greater than £3000 OR period is two weeks and amount given is greater than £6000 OR period is four weeks/calendar month and amount given is greater than £12000 OR other period given and amount given is more than £150,000: (Wpotp = 1 AND WpAotp > 3000) OR (Wpotp = 2 AND WpAotp > 6000) OR (Wpotp = 4 ,5 AND WpAotp > 12000) OR (Wpotp = 3, 7, 8, 9, 10, 13, 26, 52, 90, 95 AND WpAotp > 150000), "INTERVIEWER: Are you sure? £^amount of gross pay seems high - please check."

ENDIF

IF didn't know or refused to give period or amount for gross pay: Wpotp = DK OR Wpotp = RF OR WpAotp = DK OR WpAotp = RF

IF period was given and was one week: Wpotp = 1

**WpAowb\***

Is it...

Brackets: (200,300,500,1500)

ELSEIF period was given and was two weeks: Wpotp = 2

**WpAofb\***

Is it...

Brackets: (400,600,1000,3000)

ELSEIF period was given and was four weeks or a calendar month: Wpotp = 4, 5

**WpAomb\***

Is it...

Brackets: (800,1200,2000,6000)

*ELSEIF period given and was one year or lump sum: Wpotp = 52, 95*

**WpAoyb\***

Is it...

Brackets: (10000,15000,25000,75000)

*ELSE other period given or period not given*

**WpAob\***

Is it...per month

Brackets: (800,1200,2000,6000)

*ENDIF*

*ENDIF*

**WpPeri\***

Thinking about the last time you were paid, what period did this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

**Wpslip\***

We're interested in how much tax and National Insurance gets deducted from your pay. Do you have your last payslip to hand which you could consult?

ASK OR CODE

- 1 Latest payslip consulted
- 2 Old payslip consulted
- 3 Payslip not consulted
- 4 No payslip provided by employer

*IF period for last take-home pay given: WpPeri = RESPONSE*

**Wpthp\***

What was your take-home pay last time, that is after any deductions were made for tax, National Insurance, pensions, union dues etc?

ENTER AMOUNT

ROUND TO THE NEAREST £

Range: 0..9999997

CHECK: IF period for take-home pay is one week and amount given is

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greater than £2000 OR period is two weeks and amount given is greater than £4000 OR period is four weeks/calendar month and amount given is greater than £8000 OR other period given and amount given is more than £100,000: (WpPeri = 1 AND Wpthp > 2000) OR (WpPeri = 2 AND Wpthp > 4000) OR (WpPeri = 4 ,5 AND Wpthp > 8000) OR (WpPeri = 3, 7, 8, 9, 10, 13, 26, 52, 90, 95 AND Wpthp > 100000), "INTERVIEWER: Are you sure? £^amount of take home pay seems high - please check."

ENDIF

IF doesn't know or refuses to give period or amount for take-home pay:  
Wpthp = DK OR Wpthp = RF OR WpPeri = DK OR WpPeri = RF

IF period given and is one week: WpPeri = 1

**Wpthpwb\***

Was it...

Brackets: (125,200,350,1000)

ELSEIF period given and is two weeks: WpPeri = 2

**Wpthpfb\***

Was it...

Brackets: (250,400,700,2000)

ELSEIF period given and is four weeks or calendar month:

WpPeri = 4, 5

**Wpthpmb\***

Was it...

Brackets: (500,800,1400,4000)

ELSEIF WpPeri = 52, 95

**Wpthpyb\***

Was it...

Brackets: (6000,10000,17500,50000)

ELSE other period given or period not given

**Wpthpob\***

Was it...per month

Brackets: (500,800,1400,4000)

ENDIF

ENDIF

IF gave an amount for take-home pay: Wpthp = RESPONSE

**Wpthl\***

Is this your usual take home pay?

1 Yes

2 No

IF amount paid last time is not usual take-home pay: Wpthl = 2

**WpUP\***

How much are you usually paid?

CODE PERIOD COVERED

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- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

IF period for usual pay given: WpUP = RESPONSE

**WpUPa\***

ENTER AMOUNT  
 ROUND TO NEAREST £  
 Range: 0..9999997

CHECK: If period for usual pay is one week and amount given is more than £2000 or period is two weeks and amount given is more than £4000 or period given is four weeks or a calendar month and amount is more than £8000 or other period given and amount is more than £10,000: (WpUP = 1 AND WpUPa > 2000) OR (WpUP = 2 AND WpUPa > 4000) OR (WpUP = 4, 5 AND WpUPa > 8000) OR WpUP = 3, 7, 8, 9, 10, 13, 26, 52, 90 AND WpUPa > 10000), "INTERVIEWER: Are you sure? £^amount of usual take-home pay seems high - please check."

ENDIF

IF doesn't know or refuses to give period or amount of usual pay: WpUP = DK OR WpUP = RF OR WpUPa = DK OR WpUPa = RF

IF period given and one week: WpUP = 1

**WpupaWb\***

Would it be...  
 Brackets: (125,200,350,1000)

ELSEIF period given and two weeks: WpUP = 2

**Wpupafb\***

Would it be...  
 Brackets: (250,400,700,2000)

ELSEIF period given and is four weeks or calendar month:  
 WpUP = 4, 5

**Wpupamb\***

Would it be...  
 Brackets: (500, 800,1400,4000)

ELSEIF period given and is one year or lump sum:  
 WpUP = 52, 95

**Wpupayb\***

```

| | | | Would it be...
| | | | Brackets: (6000,10000,17500,50000)
|
| | | | ELSE if other period or period not given
| | | |
| | | | Wpupaob*
| | | | Would it be...per month
| | | | Brackets: (500,800,1400,4000)
| | | |
| | | | ENDIF
| | |
| | | | WpPayA*
| | | | INTERVIEWER: HOW ACCURATE DO YOU THINK THE ANSWERS GIVEN BY THE
| | | | RESPONDENT TO QUESTIONS ABOUT PAY WERE?
| | | | 1 Very accurate
| | | | 2 Fairly accurate
| | | | 3 Not very accurate
| | | | 4 Not at all accurate
| | | |
| | | | ENDIF
| | |
| | | | IF self-employed: WpES = 2
| | | |
| | | | WPTimC
| | | | Start of self employment (set by WpIR)
| | | | TIME
| | | |
| | | | IF sole director of own limited company OR running a business or
| | | | professional practice OR a partner in a business or professional
| | | | practice: WpCJb = 2, 3, 4, ^irtxt = In your business are annual
| | | | business accounts prepared.
| | | | ELSE ^irtxt, = Do you prepare annual business accounts
| | | |
| | | | WpIR
| | | | ^irtxt for the Inland Revenue for tax purposes?
| | | | 1 Yes
| | | | 2 No
| | | | 3 Not yet but will be
| | | |
| | | | IF prepares accounts for Inland revenue: WpIR = 1
| | | |
| | | | Wpap
| | | | Are you working on your own account or are you in partnership
| | | | with someone else?
| | | | 1 Own account (sole owner)
| | | | 2 In partnership
| | | |
| | | | IF working in partnership: Wpap = 2
| | | |
| | | | Wpysh
| | | | The questions that follow are just about your own share of the
| | | | business - that is not including your partner's share.
| | | | Enter '1' to continue
| | | |
| | | | ENDIF

```

**WpraIR**

What is the most recent period for which accounts have been prepared for the Inland Revenue?

ENTER YEAR AT START OF THE PERIOD

Range: 1900..2050

*IF gave a year: WpraIR = RESPONSE*

**WpraIM**

(What is the most recent period for which accounts have been prepared for the Inland Revenue?)

CODE MONTH AT START OF THE PERIOD

IF DOESN'T KNOW MONTH, CODE SEASON

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

CHECK: IF year given is a later than 2002: WpraIR > Qinit.FWYear), INTERVIEWER: "This is later than ^2002! Please check!"

CHECK: IF year given is before 1995: WpraIR < 1995, INTERVIEWER: "That seems a long time ago (^year most recent Inland Revenue account was prepared). Can I check I have recorded that correctly?"

CHECK: IF year and month given are after the date of interview: Qinit.Intdat < WpraIR, WpraIM, INTERVIEWER: "This date is in the future (^month for which most recent Inland Revenue account prepared ^year for which most recent Inland Revenue account prepared)! Please change!"

*ENDIF*

**WpraEY**

(What is the most recent period for which accounts have been prepared for the Inland Revenue?)

ENTER YEAR AT END OF THE PERIOD

Range: 1900..2050

*IF year given: WpraEY = RESPONSE*

**WpraEM**

(What is the most recent period for which accounts have been prepared for the Inland Revenue?)

CODE MONTH AT END OF THE PERIOD

ELSA Wave 1 Questionnaire - May 2002

IF DOESN'T KNOW MONTH, CODE SEASON

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

CHECK: IF year given in later than 2002: WpraEY >  
Qinit.FWYear, INTERVIEWER: "This is later than ^2002! Please  
check!"

CHECK: IF year given is before 1995: WpraEY < 1995  
INTERVIEWER: "That seems a long time ago (^year most recent Inland  
Revenue account was prepared). Can I check I have recorded that  
correctly?"

CHECK: IF month and year given are later than interview date:  
Qinit.Intdat < WpraEY, WpraEM,"INTERVIEWER: This date is in  
the future (^month for which most recent Inland Revenue  
account prepared ^year for which most recent Inland Revenue account  
prepared)! Please change!"

ENDIF

**WpProf**

What was the amount of your share of the profit or loss figure  
shown on these accounts for this period?  
Range: 0..999997

CHECK: IF amount given is greater than £120,000: WpProf >  
120000, INTERVIEWER: "Are you sure? £^amount of profit or loss seems  
high - please check."

IF don't know or refuse to give amount: WpProf = DK OR RF

**WpProfb**

Was it...  
Brackets (5000,10000,20000,60000)

ENDIF

**WpPL**

Does this amount refer to a profit or loss?

- 1 Profit/earnings
- 2 Loss

IF refers to profit/earnings: WpPL = 1

**WpBDT**

Can I just check, is that figure before deduction of income tax?

- 1 Yes (before tax)
- 2 No (after tax)

**WpbdNI**

And is that figure before deduction of National Insurance?

- 1 Yes (before NI)
- 2 No (after NI)

ENDIF

ENDIF

*IF doesn't prepare accounts for Inland Revenue: WpIR = 2, 3*

**WpBI**

Now I'd like to ask some questions about your income from your ^business/work, that is after paying for any materials, equipment or goods that you use in your work.

On average what was your weekly or monthly income from ^the business/your work over the last 12 months?

CODE WHETHER AMOUNT WILL BE GIVEN WEEKLY OR MONTHLY

- 1 Weekly
- 2 Monthly

*IF answer given weekly: WpBI = 1*

**WpBIwa**

ENTER AVERAGE WEEKLY INCOME OVER LAST 12 MONTHS

Range: 0..999997

CHECK: IF average weekly income from business or work is £8000 or more: WpBIwa >= 8000, INTERVIEWER: "Are you sure? £^average weekly income from business or work seems high - please check."

*IF don't know or refuse to give amount: WpBIwa = DK OR RF*

**WpBiwab**

Was it...

Brackets: (200,400,1000,4000)

ENDIF

ENDIF

*IF answer given in months: WpBI = 2*

**WpBIma**

ENTER AVERAGE MONTHLY INCOME OVER LAST 12 MONTHS

0..999997

CHECK: IF average monthly income over last 12 months is £30,000 or more: WpBIma >= 30000, INTERVIEWER: "Are you sure? £^average monthly income over last 12 months seems high - please check."

ENDIF

*IF don't know or refused to give amount: WpBIma = DK OR RF*

**WpBIMab**

Was it...

ELSA Wave 1 Questionnaire - May 2002

```
| | Brackets: (800,1500,4000,15000)
| |
| | ELSE don't know or refused to choose whether to give a weekly or
| | monthly figure: WpBI = DK OR RF
| |
| | WpBIMab
| | Was it...
| | Brackets: (800,1500,4000,15000)
| |
| | ENDIF
| |
| | ENDIF
| |
| | IF sole director of own limited company OR running a business or
| | professional practice OR a partner in a business or professional
| | practice: WpCJb = 2, 3 OR 4
| |
| | WpbusV
| | About how much is ^your share of the business worth?
| | Range: 0..99999997
| |
| | CHECK: IF share of the business is worth £2,000,000 or more: WpbusV >=
| | 2000000, INTERVIEWER: "Are you sure? £^share of the business seems high
| | - please check."
| |
| | IF don't know or refuses to give amount: WpbusV = DK OR RF
| |
| | WpBusVB
| | Is it...
| | Brackets: (25000,100000,250000,1000000)
| |
| | ENDIF
| |
| | ENDIF
| |
| | ENDIF
```

NEW BLOCK

IF in paid work or temporarily away: WpActw = 1 OR 2, mojtxt = other work  
that you might do apart from your main job,  
ELSE mojtxt = work that you might do from time to time

**WpMoJ**

^Can I just check, do you currently earn any money from ^mojttx?

INCLUDE PAID BABYSITTING, MAIL ORDER AGENT, POOLS AGENT ETC

1 Yes

2 No

IF earns any money from other jobs or casual jobs: WpMoJ = 1

**WpHmsj**

How many hours do you usually work a month in these jobs,  
excluding any meal breaks but including any overtime you might do?

Range: 1..700

CHECK: IF hours worked in other jobs/casual jobs PLUS hours worked in  
main job add up to an average of more than 70 per week: IF

WpHmsj/4 + wphjob/wphwrk > 70, INTERVIEWER: "This means  
^name works more than 70 hours per week (in all his/her  
jobs). Please check."

**WpEsj**

After tax and any other deductions, what was your total income from these jobs in the last month?

ENTER AMOUNT

ROUND TO THE NEAREST £

Range: 0..9999997

CHECK: IF total income from these jobs was £5,000 or more in the last month: WpEsj >= 5000, INTERVIEWER: "Are you sure? ^total income from these jobs in the last month seems high - please check."

IF don't know or refuses to given amount: WpEsj = DK OR RF

**WpEsjB**

Was it...

Brackets (250,500,1000,2500)

ENDIF

IF income last month from other jobs/casual jobs was zero: WpEsj = RESPONSE AND WpEsj = 0

**WpEsjm**

After tax and other deductions, what is your average monthly income from these jobs?

ENTER AMOUNT

ROUND TO THE NEAREST £

Range: 0..9999997

IF don't know or refuses to give amount: WpEsjm = DK OR RF

**WpEsjmb**

Was it...

Brackets: (250,500,1000,2500)

ENDIF

ENDIF

ENDIF

**WpBus**

Can I just check, apart from anything you've already told me about, do you own all or part of a business (as an active or sleeping partner)?

1 Yes

2 No

IF owns all or part of a business: WpBus = 1

**WpVBus**

About how much is your share of the business worth?

Range: 0..99999997

IF don't know or refuses to give answer: WpVBus = DK OR RF

**WpVBusB**

Is it...

Brackets: (25000,100000,250000,1000000)

ENDIF

|  
 ENDIF

NEW BLOCK

Time at start of employee pensions (set by WpERet or WpBPS)  
 TIME

IF in paid work or temporarily away: WpActW = 1 OR 2

| IF an employee: WpES = 1

| | IF aged 50 or over: IAgeof >= 50

| | **WpEret**

| | Have you been offered any form of early retirement incentives since you were 50 which you chose not to take?

- | | 1 Yes
- | | 2 No

| | IF been offered early retirement incentives: WpEret = 1

| | | **WpERAG**

| | | How old were you?

| | | Range: 50..120

| | | CHECK: IF offered retirement incentives at age olderer than current age: WpERAG > IAgeof "INTERVIEWER: The respondent is only ^respondent's age now. Please check!"

| | ENDIF

| ENDIF

| **WpBPS**

| Thinking again about your main job, does your employer offer a pension scheme which you are entitled to join?

- | 1 Yes
- | 2 No

| IF employer doesn't offer a pension scheme which respondent can join or doesn't know/refuses to answer: WpBPS <> 1

| | **WpAnyP**

| | Does your employer offer a pension scheme to any employees?

- | | 1 Yes
- | | 2 No

| | ENDIF

| IF offers pension scheme which respondent can join: WpBPS = 1

| | **WpPS**

| | Are you a member of this pension scheme?

- | | 1 Yes
- | | 2 No

| | IF member of pension scheme: WpPS = 1

| | | **WpDPS**

| | | SHOW CARD U

Is your pension more like Type A or Type B?  
TYPE A IS SOMETIMES CALLED DEFINED CONTRIBUTION OR MONEY  
PURCHASE,  
TYPE B IS SOMETIMES CALLED DEFINED BENEFIT  
1 Type A: My pension contributions are put into a fund  
which grows over time and my pension will depend on the  
size of this fund when I retire  
2 Type B: My pension will be based on a formula involving  
age, years of service and salary  
3 Don't know

*ELSEIF not a member of pension scheme: WpPS = 2*

**WpPSM**

Why aren't you a member of the scheme?

PROBE: What else?

CODE ALL THAT APPLY

- 1 Preferred, or already had, other arrangement
- 2 Expected to move job
- 3 Could not afford payments
- 4 Not eligible to join
- 95 Other reason (SPECIFY)

*IF is not a member of the pension scheme for some other reason:*

*WpPSM = 95*

**WpPSMo**

INTERVIEWER : ENTER OTHER ANSWER

Text: Up to 40 characters

*ENDIF*

*IF reason not a member of pension scheme is not because not  
eligible to join: WpPSM <> 4*

**WpEC**

If you joined the scheme and made contributions, would  
your employer add to your contributions to the pension  
scheme to give you a higher pension?

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

*IF employer would contribute to pension scheme: WpEC = 1*

**WPEcA**

Would this be ... READ OUT ...

- 1 ... automatic,
- 2 or, at employer's discretion?
- 3 Don't know

*ENDIF*

*ENDIF*

*ENDIF*

*ENDIF*

*ENDIF*

ENDIF

**Wp1Ask**

Computed - ask WpCPS?

- 1 Yes
- 2 No

**Wp2Ask**

Computed - ask WpCps for a second time?

- 1 Yes
- 2 No

**WpCAsk**

Computed - ask wpcemp on 2nd loop?

- 1 Yes
- 2 No

Wp1Ask = 2

Wp2Ask = 2

WpCAsk = 2

IF in paid work or temporarily away and hasn't already said that they are a member of an employer-provided pension scheme OR if not in paid work or temporarily away and aged under 65: (WpPS <> 1 AND (WpActW = 1 OR 2)) OR ((WpActW NOT = 1 OR 2) AND ageOf < 65)

Wp1Ask = 1

IF in paid work or temporarily away and not an employee OR if not in paid work or temporarily away and aged under 65: ((WpActW = 1 OR 2) AND WpES <> 1) OR ((WpActW NOT = 1 OR 2) AND ageof < 65)

**WPIntB\***

Now I want to ask you some questions about any pension arrangements you may have *^for your retirement*. The next questions are about pension arrangements you might have other than state pensions. Enter '1' to continue

ENDIF

ENDIF

IF NOT the case that does not have a current pension scheme: WpCPS <> 2 AND WpCPSC <> 2

IF working or temporarily away OR (not working/temporarily away AND aged under 65: (WpActW = 1 OR 2) OR ((WpActW <> 1 OR 2) AND IageOf < 65)

Wp2Ask = 1

ENDIF

ENDIF

IF has a second job/does casual work OR if employer didn't contribute to first current personal pension reported: WpMoJ = 1 OR WpCemp = 2

WpCAsk = Yes

ENDIF

**WpXno**

(Whether asking current pension questions) First or second time?  
Range: 1..7

IF (WpXno = 1 AND Wp1Ask = 1) OR (WpXno = 2 AND Wp2Ask = 1)

**WpCPS\***

*^Can I just check, apart/Apart from state pensions, do you currently contribute to ^a/any other pension scheme (please include schemes in which contributions are made on your behalf)?*

- 1 Yes
- 2 No

*IF not currently contributing to a pension scheme: WpCPS = 2*

**WpCPSC\***

*^Can I just check do/do you have ^a/any other pension scheme to which you could contribute?*

DON'T COUNT PAST PENSIONS OR PENSIONS RESPONDENT IS CURRENTLY RECEIVING

- 1 Yes
- 2 No

ENDIF

*IF currently contributing to a pension scheme: WpCPS = 1 OR WpCPSC = 1*

**WpKP\***

SHOW CARD T

What kind of pension scheme is it?

- 1 Employer provided (occupational) pension scheme
- 2 Private Personal Pension
- 3 Group Personal Pension
- 4 Stakeholder pension
- 5 S226 plan (self-employed personal pension)
- 6 Retirement Annuity pensions (pre 86 PPPs)
- 95 Other retirement saving scheme

CHECK: IF has employer pension scheme and earlier said was not a member of employer pension scheme: WpKP = 1 AND WpPS = No, INTERVIEWER: "Are you sure? Respondent said earlier that they were not a member of their employer's pension scheme."

CHECK: IF has employer pension scheme and said earlier was self-employed: WpKP = 1 AND WpES = 2, INTERVIEWER: "Are you sure? Respondent said earlier they were self employed."

*IF has other retirement savings scheme: WpKP = 95*

**WpKind\***

What kind of scheme is it?

WRITE IN

Text: up to 60 characters

ENDIF

*IF has employer provided pension scheme: WpKP = 1*

**WpPdes**

```

SHOW CARD U
Is your pension more like Type A or Type B?
TYPE A IS SOMETIMES CALLED DEFINED CONTRIBUTION OR MONEY
PURCHASE, TYPE B IS SOMETIMES CALLED DEFINED BENEFIT
1   Type A: My pension contributions are put into a fund which
    grows over time and my pension will depend on the size of
    this fund when I retire
2   Type B: My pension will be based on a formula involving
    age, years of service and salary
3   Don't know
ENDIF
ENDIF
ENDIF

```

*IF not a proxy interview and don't know whether employer scheme is a DC or DB scheme OR if has other retirement savings scheme OR if proxy interview and is currently contributing or could currently contribute to any kind of pension scheme: (IAskpx <> 1 AND WpPdes = 3 OR WpXno = 1 AND WpDPS = 3 OR WpKP = 95) OR (IAskpx = 1 AND WpCPS = 1 OR WpCPSC = 1*

```

WpOars*
How many years have you ^been in/had this ^retirement savings
scheme/pension arrangement?
Range: 0..60
ENDIF

```

*IF has a DB or DC pension scheme (employer provided): (WpPdes = 1 OR 2) OR (WpXno = 1 AND (WpDPS = 1 OR 2))*

```

WpNps
What is the name of the pension scheme?
PROBE FOR DETAILS
IF POLICE, LOCAL AUTHORITY ETC, PROBE FOR NAME OF FORCE / LOCAL
AUTHORITY ETC.
WRITE IN
Text: up to 80 characters

```

```

WpCos
Is it a contracted out scheme (this means that you pay a lower
rate of National Insurance contribution and give up your
entitlement to the State Earnings-Related Pension scheme)?
1   Yes
2   No
3   Don't know

```

```

WpYbs
How many years have you belonged to this scheme?
INCLUDE YEARS IN SAME SCHEME WITH OTHER EMPLOYERS
Range: 0..60

```

```

WpErc
Does your employer require you to make a contribution to your
pension scheme?
1   Yes
2   No
3   Don't know

```

*IF required to make a contribution to pension schem: WpErc = 1*

**WpMc**

What is the minimum contribution you need to make?

CODE HOW ANSWER IS GIVEN

- 1 Amount
- 2 Percentage of salary
- 3 Don't know

*IF answer given in an amount: WpMc = 1*

**WpMca**

INTERVIEWER ENTER AMOUNT

Range: 0..9997

CHECK: IF minimum contribution is £2500 or more: WpMca >= 2500,  
INTERVIEWER: "Are you sure? ^Minimum contribution seems high - please  
check."

**WpPerc**

What period does this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*ENDIF*

*IF answer given as a fraction of salary given: WpMc = 2*

**WpMFrac**

INTERVIEWER: ENTER PERCENTAGE OF SALARY

Range: 0..100

*ENDIF*

*ENDIF*

*IF not required to make a contribution to pension scheme:*

*WpErc = 2*

**WpYcAmt**

How much do you currently contribute to your pension scheme?

CODE HOW ANSWER IS GIVEN

- 1 Amount
- 2 Percentage of salary
- 3 Not currently contributing
- 4 Don't know

*IF answer given in amount: WpYcAmt = 1*

**WpYca**

INTERVIEWER ENTER AMOUNT

Range: 0..99997

CHECK: IF current contribution is £10000 or more: WpYca >= 10000,  
INTERVIEWER: "Are you sure? *fcurrent contribution* seems high - please  
check."

**WpMcaf**

What period does this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

ENDIF

IF answer given as fraction of salary: WpYcAmt = 2

**WPYFrac**

INTERVIEWER: ENTER PERCENTAGE OF SALARY

Range: 0..100

ENDIF

ENDIF

IF has a DB pension scheme (employer provided) and required to  
contribute to scheme: (WpPdes = 2 OR (WpXno = 1 AND WpDPS = 2))  
AND WpErc = 1

**WpAcon**

Do you make any additional contributions to your pension scheme  
through ... READ OUT ...

- 1 ... Additional Voluntary Contributions (AVCs),
- 2 buying Added Years,
- 3 or Irregular contributions?
- 4 No
- 5 Don't know

IF makes additional voluntary contributions: WpAcon = 1

**WpAcoA**

How much do you usually contribute through additional  
voluntary contributions (AVC's)?

CODE HOW ANSWER IS GIVEN

- 1 Amount
- 2 Percentage of salary
- 3 Don't know

*IF answer given as an amount: WpAcoA = 1*

**WpAcoB**

INTERVIEWER ENTER AMOUNT

Range: 0..99997

CHECK: IF AVC contribution is £10000 or more: WpAcoB >= 10000,  
INTERVIEWER: "Are you sure? £<sup>^</sup>amount of AVC contribution seems  
high - please check."

**WpAcoC**

What period does this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*ENDIF*

*IF answer given as fraction of salary: WpAcoA = 2*

**WpFras**

INTERVIEWER: ENTER PERCENTAGE OF SALARY

Range: 0..100

*ENDIF*

*ENDIF*

*IF makes additional irregular contributions: WpAcon = 3*

**Wpcony**

How much did you contribute in the last 12 months through  
additional irregular contributions?

ENTER AMOUNT

Range: 0..99997

CHECK: IF amount of additional irregular contributions is £50000 or  
more: Wpcony >= 50000, INTERVIEWER: "Are you sure? £<sup>^</sup>amount of  
additional irregular contributions seems high - please check."

*ENDIF*

*IF makes additional contributions through added years:*

*WpAcon = 2*

**WpAdy**

How many added years did you get in the last 12 months?

Range: 0..10

ENDIF

ENDIF

IF has a DC pension scheme (employer provided) and required to contribute: ((WpPdes = 1 OR (WpXno = 1 AND WpDPS = 1)) AND WpErc = 1

**WpMMin**

Do you usually contribute more than the minimum contribution?

- 1 Yes
- 2 No

IF usually contributes more than the minimum: WpMMin = 1

**WpMUC**

How much are your usual additional contributions?

- 1 Amount
- 2 Percentage of salary
- 3 Don't know

IF answer given as an amount: WpMUC = 1

**WPAuc**

INTERVIEWER: ENTER AMOUNT

0..99997

CHECK: IF amount usual additional contributions is £50000 or more:

WPAuc >= 50000, INTERVIEWER: "Are you sure? £^amount of usual additional contributions seems high - please check."

**WPPER**

What period does this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

ENDIF

IF answer given as fraction of salary: WpMUC = 2

**WPFruc**

INTERVIEWER: ENTER PERCENTAGE OF SALARY

0..100

ENDIF

ENDIF

```
|
| ENDIF
|
| IF not currently contributing to pension scheme: WpYcAmt = 3
|
| WpAnyc
| Did you contribute at all in the last 12 months?
| 1 Yes
| 2 No
|
| IF contributed in last 12 months: WpAnyc = 1
|
| WpACamt
| How much did you contribute in the last 12 months?
| ENTER AMOUNT
| Range: 0..99997
|
| CHECK: IF amount of pension contribution in last 12 months is £50000
| or more: WpACamt >= 50000, INTERVIEWER: "Are you sure? £^amount of
| pensions contribution in last 12 months seems high - please check."
|
| ENDIF
|
| ENDIF
|
| WpEcon
| How much does your employer currently contribute to your pension
| scheme?
| CODE HOW ANSWER IS GIVEN
| 1 Amount
| 2 Percentage of salary
| 3 Percentage of contribution
| 4 Does not currently contribute
| 5 Don't know
|
| IF answer given as an amount: WpEcon = 1
|
| WpEcona
| INTERVIEWER ENTER AMOUNT
| Range: 0..99997
|
| CHECK: IF amount of employer contribution is £100000 or more: WpEcona
| >= 10000, INTERVIEWER: "Are you sure? £^amount of employer contribution
| seems high - please check."
|
| WpEperi
| What period does this cover?
| 1 One week
| 2 Two weeks
| 3 Three weeks
| 4 Four weeks
| 5 Calendar month
| 7 Two Calendar months
| 8 Eight times a year
| 9 Nine times a year
| 10 Ten times a year
| 13 Three months/13 weeks
| 26 Six months/26 weeks
| 52 One Year/12 months/52 weeks
| 90 Less than one week
| 95 One off/lump sum
```

| 96 None of these (EXPLAIN IN A NOTE)

| *ENDIF*

| *IF employer contributes percentage of salary or percentage of contributions: WpEcon = 2 OR 3*

| **WpEfs**

| INTERVIEWER: ENTER PERCENTAGE OF SALARY OR CONTRIBUTION

| Range: 0..100

| *ENDIF*

| **WpTimF**

| Start of expectations of retirement (set by WpNRA)

| TIME

| **WpNRA**

| Is there a Normal Retirement Age in your pension scheme or period of service after which scheme members can retire?

- | 1 Yes - normal retirement age
- | 2 Yes - period of service
- | 3 Yes - both / either
- | 4 No - neither
- | 5 Don't know

| *IF has a normal retirement age or both a normal retirement age and period of service: WpNRA = 1 OR 3*

| **WpBthA**

| What is the normal retirement age?

| Range: 0..120

| CHECK: IF normal retirement age is 40 or under OR 70 or over: WpBthA = 41..69, "Check: This seems unusual (^normal retirement age), can I check?"

| *ENDIF*

| *IF has a period of service or both a period of service and normal retirement age: WpNRA = 2 OR 3*

| **WpBthP**

| What is the period of service?

| Range: 0..120

| CHECK: IF period of service is less than 20 years or more than 50 years: WpBthP = 21..49, "Check: This seems unusual (^period of service), can I check?"

| *ENDIF*

| *IF has a normal retirement age or both a normal retirement age and period of service: WpNRA = 1, 3*

| **WpEra**

| Does your pension scheme have an earlier age at which you can retire and draw pension benefits?

- | 1 Yes
- | 2 No
- | 3 Occasionally

ENDIF

IF pensions scheme has an early retirement age OR if pension scheme does not have a normal retirement age: WpEra = 1, 3 OR WpNRA = 2, 4, 5

**WpYaer**

What currently is the youngest age at which you could take early retirement?

WRITE IN

Range: 0..120

CHECK: IF youngest age at which can take retirement is under 50: WpYaer < 50, "Check: This seems young (^youngest age at which can take retirement), can I check?"

CHECK: IF early retirement age is greater than normal retirement age: WpYaer >= WpBthA "Check: This is older than the normal retirement age, please correct"

ENDIF

IF had a DB pension scheme (employer provided): WpPdes = 2 OR (WpXno = 1 AND WpDPS IN 2)

**WpDesP**

SHOW CARD V

Which of these best describes how your pension will be calculated?

CODE ONE ONLY

- 1 Some fraction of my final year's salary
- 2 Some fraction of my salary from all years when I have been in the scheme
- 3 Some fraction of my last five years salary
- 4 In some other way
- 5 Don't know

IF pension will be calculated in some other way: WpDesP = 4

**WpOdp**

WRITE IN OTHER WAY

Text: up to 70 characters

ENDIF

IF knows how pension will be calculated: WpDesP <> 5

**WpFsap**

What fraction will be added to your final pension for each years service?

- 1 1/60
- 2 1/80
- 3 other
- 4 Don't know

IF other fraction of salary: WpFsap = 3

**Wpfsal**

INTERVIEWER ENTER OTHER FRACTION

Text: up to 20 characters

ENDIF

ENDIF

**WpPlp**

All pensions go up with prices after retirement (sometimes known as index-linked), but some may go up more than prices. Will your pension go up more than prices after retirement?

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

ENDIF

IF pension will go up with more than prices: WpPlp = 1

**WpPlpH**

Will this be ... READ OUT ...

- 1 ... automatic,
- 2 or, at your employer's (scheme's) discretion?
- 3 other
- 4 Don't know

ENDIF

IF has a DB pension scheme (employer pension): WpPdes = 2 OR  
(WpXno = 1 AND WpDPS = 2)

**WpLump**

What size lump sum do you expect to receive when you retire?  
Range: 0..9999997

CHECK: IF amount of lump sum is more than £400,000: WpLump > 400000  
INTERVIEWER: "Are you sure? £^amount of lump sum seems high - please check."

IF doesn't know or refused to give amount of lump sum: WpLump = DK OR  
RF

**WpLumpb**

Would it be...  
Brackets: (5000,15000,50000,200000)

ENDIF

**WpPTP**

How much do you expect to get from this pension when you retire?

IF ASKED : IN TODAY'S PRICES

CODE HOW ANSWER IS GIVEN

- 1 Income as a percentage of salary
- 2 Income as an annual amount of money

IF answer given as percentage of salary: WpPTP = 1

**WpPsal**

INTERVIEWER ENTER PERCENTAGE  
Range: 0..100

ENDIF

IF answer give as annual amount: WpPTP = 2

**WpAsal**

INTERVIEWER ENTER AMOUNT

Range: 0..999997

CHECK: IF annual amount of pension expected is more than £100,000:

WpAsal > 100000, INTERVIEWER: "Are you sure? £^annual amount of pension expected seems high - please check."

ENDIF

IF doesn't know or refuse to give amount of pension expected:

WpAsal = DK OR RF

**WpASalb**

Would it be...per year

Brackets: (2500,5000,12500,50000)

ELSEIF doesn't know or refuses to give period over which pension is expected: WpPTP = DK OR RF

**WpASalb**

Would it be...per year

Brackets: (2500,5000,12500,50000)

ENDIF

**WpFSav**

Do you make any Free Standing Additional Voluntary Contributions (FSAVC'S)?

1 Yes

2 No

IF makes free-standing additional voluntary contributions:

WpFSav = 1

**WpPFVal**

What is the value of your accumulated contributions at this point?

Range: 0..9999997

CHECK: IF amount of FSAVC is more than £200,000: WpPFVal >= 200000, INTERVIEWER: "Are you sure? £^amount of FSAVC seems high - please check."

IF doesn't know or refuses to give amount of FSAVC: WpPFVal = DK OR RF

**WpPFValb**

Would it amount to...

Brackets: (2500,7500,25000,100000)

ENDIF

ENDIF

ENDIF

IF has a DC pension scheme (employer provided): WpPdes = 1 OR (WpXno = 1 AND WpDPS = 1)

**WpAPF**

What is the value of the accumulated pension fund at this point?

Range: 0..9999997

CHECK IF value of accumulated pension fund is more than £200,000: WpAPF > 200000, INTERVIEWER: "Are you sure? £^value of accumulated pension fund seems high - please check."

IF doesn't know or refuses to give value of accumulated pension fund:  
WpAPF = DK OR WpAPF = RF

**WpAPFb**

Is it...

Brackets: (2500,7500,25000,100000)

ENDIF

**WpPtoP**

How much do you expect the pension to be worth when you retire?

IF ASKED: IN TODAY'S PRICES

CODE TYPE OF ANSWER GIVEN

- 1 Total amount of pension
- 2 Annual Amount
- 3 Don't know

IF answer given as a total amount or annual amount:

WpPtoP = 1 OR 2

**WpPenB**

INTERVIEWER ENTER AMOUNT

Range: 0..9999997

CHECK: IF amount expects pension to be worth when retires is a total amount and more than £300,000 OR is an annual amount and more than £100,000: (WpPtoP = 1 AND WpPenB > 300000) OR (WpPtoP = 2 AND WpPenB > 100000), INTERVIEWER: "Are you sure? £^amount expects pension to be worth when retires seems high - please check."

IF doesn't know or refuses to give amount expects pension to be worth when retires: WpPenB = DK OR RF

IF amount given as total amount: WpPtoP = 1

**WpPenTB**

Would it be...

Brackets: (5000,15000,50000,150000)

ENDIF

ENDIF

ENDIF

IF amount given as annual amount and doesn't know or refuses to give amount: WpPtoP = 2 AND (WpPenB = DK OR RF)

**WpPenAB**

Would it be...

Brackets: (2500,5000,12500,50000)

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```
| | ELSEIF doesn't know or refuses to say how amount given: WpPtoP = DK OR
| | RF OR 3
| |
| | WpPenAB
| | Would it be...per year
| | Brackets: (2500,5000,12500,50000)
| |
| | ENDIF
| |
| | ENDIF
| |
| | ENDIF
```

IF has an employer-provided pension scheme: WpKP = 1 OR (WpXno = 1 AND WpPS = 1)

```
| | WpCons
| | We may wish to contact your employer to find out more about the
| | rules of their pension scheme. Would you be willing to give us
| | their name and address for this purpose?
| | 1 Employer's name and address given
| | 2 Employer's name and address not given
| |
| | IF employer's name and address given: WpCons = 1
| |
| | WpEAdd
| | ENTER EMPLOYER'S NAME AND ADDRESS
| | Text: up to 80 characters
| |
| | ENDIF
| |
| | ENDIF
```

IF has a private personal, group personal, stakeholder or retirement annuity pension: WpKP = 2, 3, 4 OR 6

```
| | WpPlon
| | How long have you had this Personal Pension?
| | ENTER NUMBER OF YEARS
| | Range: 0..80
| |
| | WpPCont
| | Not including any National Insurance Contributions paid into the
| | pension, do you contribute to your pension ... READ OUT ...
| | 1 never,
| | 2 regularly,
| | 3 irregularly,
| | 4 or, have you stopped contributing to your scheme?
| |
| | IF makes regular contributions: WpPCont = 2
| |
| | WpHCon
| | How much do you usually contribute?
| | CODE HOW ANSWER IS GIVEN
| | 1 Amount
| | 2 Percentage of salary
| | 3 Don't know
| |
| | IF regular contributions given as amount: WpHCon = 1
| |
| | WpCAmt
```

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INTERVIEWER ENTER AMOUNT  
Range: 0..99997

CHECK: IF amount of regular contributions is more than £10,000:  
WpCAmt > 10000, INTERVIEWER: "Are you sure? £^amount of regular  
contributions seems high - please check."

**WpCPer**

What period does this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

ENDIF

IF amount given as fraction of salary: WpHCon = 2

**WpNifp**

INTERVIEWER ENTER PERCENTAGE OF SALARY  
Range: 0..100

ENDIF

ENDIF

IF makes irregular contributions: WpPCont = 3

**WpLcoY**

When did you last make a contribution?  
ENTER YEAR AT THIS QUESTION  
Range: 1900..2050

CHECK: IF year of last contribution is later than 2002: WpLcoY > 2002,  
INTERVIEWER: "This is later than ^2002! Please check!"

IF year last made contribution is 1999 or later: WpLcoY =  
RESPONSE AND >= 1999

**WpLcoM**

(When did you last make a contribution?)  
CODE MONTH AT THIS QUESTION  
IF DOESN'T KNOW MONTH, CODE SEASON

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July

8 August  
 9 September  
 10 October  
 11 November  
 12 December  
 13 Winter (start of year)  
 14 Spring  
 15 Summer  
 16 Autumn  
 17 Winter (end of year)

CHECK: IF year and month of last contribution are later than date of interview: Intdat > (WpLcoY,ORD(WpLcoM)),1)  
 INTERVIEWER: "This date is in the future (^month of last contribution ^year of last contribution)! Please change!"

ENDIF

**WpMcon**

About how much did you contribute on that occasion?

CODE HOW ANSWER IS GIVEN

1 Amount  
 2 Percentage of salary  
 3 Don't know

IF contribution given as amount: WpMcon = 1

**WpAC**

INTERVIEWER ENTER AMOUNT?

Range: 0..99997

CHECK: IF amount of contribution given is more than £10,000: WpAC > 10000, INTERVIEWER: "Are you sure? £^amount of contribution seems high - please check."

ENDIF

IF contribution given as fraction of salary: WpMcon = 2

**WpFSC**

INTERVIEWER ENTER PERCENTAGE OF SALARY?

Range: 0..100

ENDIF

IF year made last contribution was 2001: WpLcoY = 2001

**WpNirr**

About how many times in the last year did you contribute to your pension?

0..60

CHECK: IF made 10 or more contributions in the last year: WpNirr >= 10, "This number seems high (^number of pension contributions made in last year), can I check?"

ENDIF

ENDIF

IF stopped contributing to pension scheme: WpPCont = 4

**WpLastY**

When was the last contribution you made?

ENTER YEAR AT THIS QUESTION

Range: 1900..2050

CHECK: IF year of last contribution is later than 2002: WpLastY > 2002

INTERVIEWER: "This is later than ^2002! Please check!"

*IF year made last contribution was 1999 or later: WpLastY =  
RESPONSE AND >= 1999*

**WpLastM**

(When was the last contribution you made?)

CODE MONTH AT THIS QUESTION

IF DOESN'T KNOW MONTH, CODE SEASON

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

CHECK: IF year and month of last contribution are later than  
interview date: (Intdat >= ((WpLastY,ORD(WpLastM)),1))

INTERVIEWER: "This date is in the future (^month of last contribution  
^year of last contribution)! Please change!"

ENDIF

**WpMlas**

How much was your last contribution?

ENTER AMOUNT

Range: 0..99997

CHECK: IF amount of last contribution was more than £10,000: WpMlas >  
10000, INTERVIEWER: "Are you sure? £^amount of last contribution seems  
high - please check."

**WpLasP**

What period did that cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year

- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

**WpRcon**

Did you previously contribute regularly to this pension?

- 1 Yes
- 2 No

**WpRsc**

Why did you stop contributing to this Personal Pension?

- 1 Moved job and joined employer's pension scheme
- 2 Rejoined employer's pension scheme in existing job
- 3 Rejoined State Earnings Related Pension Scheme
- 4 Worried about risks
- 5 Worried about publicity concerning personal pensions
- 95 Other (specify)

*IF other reason why stopped contributing: WpRsc = 95*

**WpRscO**

ENTER OTHER REASON

Text: up to 20 characters

*ENDIF*

*ENDIF*

*IF (WpXno = 1 AND WpES = 1) OR (WpXno = 2 AND WpCAsk = 1)*

**WpCemp**

Does your employer contribute to this pension?

- 1 Yes - regularly
- 2 Yes - irregularly
- 3 No

*IF employer contributes irregularly: WpCemp = 2*

**WpECPP**

How much was the last contribution that your employer made to your Personal Pension?

- 1 Amount
- 2 Percentage of salary

*IF employer contribution given as an amount: WpECPP = 1*

**WpAACP**

INTERVIEWER ENTER AMOUNT

Range: 0..99997

CHECK: IF amount of employer contribution is greater than £10,000:  
WpAACP > 10000, INTERVIEWER: "Are you sure? £^amount of employer  
contribution seems high - please check."

*ENDIF*

*IF (WpECPP = fractsal) THEN*

```

| | | WpFSEC
| | | INTERVIEWER ENTER PERCENTAGE OF SALARY
| | | Range: 0..100
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | IF employer makes regular contributions: WpCemp = 1
| | |
| | | WpMEC
| | | How much does your employer usually contribute?
| | | 1 Amount
| | | 2 Percentage of salary
| | |
| | | IF employer contribution given as an amount: WpMEC = 1
| | |
| | | WpAMEC
| | | INTERVIEWER ENTER AMOUNT
| | | Range: 0..99997
| | |
| | | CHECK: IF employer contribution is more than £10,000: WpAMEC > 10000
| | | INTERVIEWER: "Are you sure? £^amount of employer contribution seems
| | | high - please check."
| | |
| | | WpFSCp
| | | What period does that cover?
| | | 1 One week
| | | 2 Two weeks
| | | 3 Three weeks
| | | 4 Four weeks
| | | 5 Calendar month
| | | 7 Two Calendar months
| | | 8 Eight times a year
| | | 9 Nine times a year
| | | 10 Ten times a year
| | | 13 Three months/13 weeks
| | | 26 Six months/26 weeks
| | | 52 One Year/12 months/52 weeks
| | | 90 Less than one week
| | | 95 One off/lump sum
| | | 96 None of these (EXPLAIN IN A NOTE)
| | |
| | | ENDIF
| | |
| | | IF employer contribution given as a percentage of salary: WpMEC = 2
| | |
| | | WpFSCo
| | | INTERVIEWER ENTER PERCENTAGE OF SALARY
| | | Range: 0..100
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | Start of expected value of personal pensions (set by Wpcuv)
| | | TIME
| | |
| | | Wpcuv

```

What is the current value of the accumulated pension fund at this point?

Range: 0..9999997

CHECK: IF current value of accumulated pension fund is more than £200,000:  $Wpcuv > 200000$ , INTERVIEWER: "Are you sure? £<sup>current value of accumulated pension fund</sup> seems high - please check."

IF doesn't know or refuses to give amount:  $Wpcuv = DK OR RF$

**Wpcuvb**

Is it...

Brackets: (2500,7500,25000,100000)

ENDIF

**WpPExp**

How much do you expect the pension to be worth when you retire?

IF ASKED: IN TODAY'S PRICES

CODE TYPE OF ANSWER GIVEN

- 1 Total amount of pension
- 2 Annual Amount
- 3 Don't know

IF answer given as total amount:  $WpPExp = 1 OR 2$

**WpAmou**

INTERVIEWER ENTER AMOUNT:

Range: 0..9999997

CHECK: IF amount expects pension to be worth when retires given as total amount and amount is more than £200,000 OR given as annual amount and amount is more than £1000,000:  $(WpPExp = 1 AND WpAmou > 200000) OR (WpPExp = 2 AND WpAmou > 100000)$ , INTERVIEWER: "Are you sure? £<sup>amount expects pension to be worth when retires</sup> seems high - please check."

ENDIF

IF amount expects pension to be worth when retires given as total amount and doesn't know or refuses to give amount:  $WpPExp = 1 AND (WpAmou = DK OR RF)$

**Wppt2tb**

Would it be...

Brackets: (5000,15000,50000,100000)

ELSEIF amount expects pension to be worth when retires given as annual amount and doesn't know or refuses to give amount:  $(WpPExp = 2 AND (WpAmou = DK OR RF))$

**Wppt2ab**

Would it be...

Brackets: (2500,5000,12500,50000)

ELSEIF doesn't know or refuses to say how answer given:  $WpPExp = 3 OR DK OR RF$

**Wppt2ab**

Would it be...per year

Brackets: (2500,5000,12500,50000)

ENDIF

ENDIF

*IF has a self-employed personal pension (S226 plan): WpKP = 5*

**WpYpen**

How many years have you had this pension?

ENTER NUMBER OF YEARS

Range: 0..80

**WpCB**

What is the value of the accumulated pension fund at this point?

Range: 0..9999997

CHECK: IF value of accumulated pension at this point is more than £200,000: WpCB > 200000, INTERVIEWER: "Are you sure? ^value of accumulated pension at this point seems high - please check."

*IF doesn't know or refuses to give value of accumulated pension at this point: WpCB = DK OR RF*

**WpCBb**

Is it...

Brackets: (2500,7500,25000,100000)

ENDIF

**WpSRC**

Do you make a regular contribution to your pension?

1 Yes

2 No

*IF makes a regular contribution to pension scheme: WpSRC = 1*

**WpMrc**

How much do you usually contribute to your pension?

Range: 0..99997

CHECK: IF usually contributes more than £10,000: WpMrc > 10000  
INTERVIEWER: "Are you sure? £^amount of usual contribution seems high - please check."

**WpMrcP**

What period does this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

ENDIF

IF does not make a regular contribution to pension scheme:

WpSRC = 2

**WpLrcY**

When was the last time that you contributed to your pension?

ENTER YEAR AT THIS QUESTION

Range: 1900..2050

CHECK: IF year of last contribution is later than 2002: WpLrcY > 2002

INTERVIEWER: "This is later than ^2002! Please check!"

IF year of last contribution is 1999 or later: WpLrcY = RESPONSE AND >= 1999

**WpLrcM**

(When was the last time that you contributed to your pension?)

CODE MONTH AT THIS QUESTION

IF DOESN'T KNOW MONTH, CODE SEASON

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

CHECK: IF year and month of last pension contribution are later than interview date: Qinit.Intdat >= ((WpLrcY,ORD(WpLrcM)),1))

INTERVIEWER: "This date is in the future (^month of last pension contribution ^year of last pension contribution)! Please change!"

ENDIF

**WpLac**

How much was the last contribution that you made to your pension?

Range: 0..99997

CHECK: IF amount of last pension contribution is more than £10,000:

WpLac > 10000, INTERVIEWER: "Are you sure? £^amount of last pension contribution seems high - please check."

IF year made last contribution was 2001: WpLrcY = 2001

**WpNCont**

About how many contributions have you made to your pension in the last year?

Range: 0..60

```

| | |
| | | CHECK: IF made 10 or more contributions in last year:
| | | WpNCont >= 10, "This number seems high (^number of contributions in
| | | the last year), can I check?"
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | IF has a self-employed personal pension (S226 plan): WpKP = 5
| | |
| | | WpLpe
| | | How much do you expect the pension to be worth when you retire?
| | | IF ASKED: IN TODAY'S PRICES
| | | CODE TYPE OF ANSWER GIVEN
| | | 1 Total amount of pension
| | | 2 Annual Amount
| | | 3 Don't know
| | |
| | | IF WpLpe = 1, 2
| | |
| | | WpLpA
| | | INTERVIEWER: ENTER AMOUNT
| | | Range: 0..9999997
| | |
| | | CHECK: IF amount expects pension to be worth when retires given as a
| | | total amount and is more than £200,000 OR given as annual amount and is
| | | more than £100,000: (WpLpe = 1 AND WpLpA > 200000) OR (WpLpe = 2 AND
| | | WpLpA > 100000), INTERVIEWER: "Are you sure? £^amount expects pension
| | | to be worth when retires seems high - please check."
| | |
| | | ENDIF
| | |
| | | IF answer given as total amount AND doesn't know or refuses to
| | | give amount: WpLpe = 1 AND (WpLpA = DK OR RF)
| | |
| | | WpLpTB
| | | Is it...
| | | Brackets: (5000,15000,50000,100000)
| | |
| | | ELSEIF answer given as annual amount AND doesn't know or refuses
| | | to give amount: WpLpe = 2 AND (WpLpA = DK OR RF)
| | |
| | | WpLpAB
| | | Is it...
| | | Brackets: (2500,5000,12500,50000)
| | |
| | | ELSEIF doesn't know or refuses to say how answer given: WpLpe = 3 OR DK
| | | OR RF
| | |
| | | WpLpAB
| | | Is it...per year
| | | Brackets: (2500,5000,12500,50000)
| | |
| | | ENDIF
| | |
| | | ENDIF

```

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IF has a current pension scheme: (WpXno = 1 AND WpPS = 1) OR (WpCPS = 1) OR (WpCPSC = 1)

**WpInfs**

From whom do you normally get information on how your pension scheme operates, for example, the benefits that you can expect to receive?

PROBE: Who else?

CODE ALL THAT APPLY

- 1 No information (exclusive code)
- 2 Employer
- 3 Pension scheme reports
- 4 Work-mates
- 5 Financial press
- 6 Accountant
- 7 Independent financial adviser
- 8 Insurance or Pension representative
- 95 other

IF has received information about pensions scheme: WpInfs <> 1

**WpFInfo**

Do you feel that you have received enough information about your expected pension at retirement?

- 1 Yes
- 2 No

ENDIF

ENDIF

IF currently contributing to a private personal pension, a group personal pension, a stakeholder pension, an S226 plan, or a retirement annuity pension OR contributes to a defined contribution or defined benefit scheme: (WpKP = 2,3,4,5 OR 6) OR (WpPdes = 1 OR 2) OR (WpDPS = 1 OR 2)

**WpPDoc\***

INTERVIEWER: CODE WHETHER RESPONDENT CONSULTED DOCUMENTS WHEN ANSWERING THE CURRENT PENSIONS QUESTIONS

- 1 Respondent consulted documents
- 2 Respondent did not consult documents

**WpIntA\***

INTERVIEWER: HOW ACCURATE DO YOU THINK THE ANSWERS GIVEN BY THE RESPONDENT WERE?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

ENDIF

Past pensions starts here  
TIME

IF has a current pension scheme: WpCPS = 1 OR WpCPSC = 1 OR WpPS = 1

**WpPrPe\***

Apart from your current scheme and any state pensions, have you ever belonged to, or contributed to a pension scheme?

INCLUDE ANY CURRENTLY BEING RECEIVED

ELSA Wave 1 Questionnaire - May 2002

```
| DO NOT INCLUDE CURRENT SCHEME
| 1   Yes
| 2   No
|
| ELSE
|
| WpPePr*
| Apart from any state pensions, have you ever belonged to, or
| contributed to a pension scheme?
| INCLUDE ANY CURRENTLY BEING RECEIVED
| 1   Yes
| 2   No
|
| ENDDIF
|
| IF has had a pension scheme in the past: WpPrPe = 1 OR WpPePr = 1
|
| WpNoSc*
| How many pension schemes have you belonged to?
| ^DO NOT INCLUDE CURRENT SCHEME
| Range: 1..10
|
| CHECK: IF has belonged to 8 or more pension schemes in the past:
| WpNoSc >= 8, "This number seems high (^number of past pension schemes),
| can I check?"
|
| REPEAT WpRec to Wptax for up to 3 past pension schemes
|
| WpRec*
| ^Thinking about your most/next most important scheme, are/Are you
| currently receiving a pension from this scheme?
| MOST IMPORTANT=MOST YEARS IN SCHEME OR MOST INCOME IN RETIREMENT
| 1   Yes
| 2   No
|
| WpMSc*
| SHOW CARD W
| What kind of pension scheme is it?
| 1   Employer provided (occupational) pension scheme
| 2   Private Personal Pension
| 3   Group Personal Pension
| 4   Stakeholder pension
| 5   S226 plan (self-employed personal pension)
| 6   Retirement Annuity pensions (pre 86 PPPs)
| 95  Other retirement saving scheme
|
| WpNP*
| What is the name of this pension scheme?
| PROBE FOR DETAILS
| IF POLICE, LOCAL AUTHORITY ETC, PROBE FOR NAME OF FORCE/LOCAL
| AUTHORITY ETC
| Text: up to 80 characters
|
| IF not currently receiving a pension from this scheme: WpRec = 2
|
| WpDS*
| Between what dates (approximately) did you belong to
| this scheme?
| ENTER YEAR STARTED
| Range: 1900..2050
|
```

CHECK: IF year started to scheme is later than year of interview: WpDS > 2002, INTERVIEWER: "This is later than ^2002! Please check!"

**WpDE\***

(Between what dates (approximately) did you belong to this scheme?)

ENTER YEAR STOPPED  
1900..2050

CHECK: IF year stopped scheme is later than year of interview: WpDE > 2002, INTERVIEWER: "This is later than ^2002! Please check!"

CHECK: IF year stopped contributing is before year started contributing: WpDE < WpDS, INTERVIEWER: "Year stopped (^WpDE) should be after year started (^WpDS). Please check!"

**WpRgh**

Have you ... READ OUT ...

- 1 ... retained pension rights in this scheme,
- 2 transferred rights from this scheme into another scheme,
- 3 or, received a lump sum refund of contributions?
- 4 SPONTANEOUS: Has stopped receiving pension from this scheme

IF has retained rights in pension scheme: WpRgh = 1

**WpPAm**

How much do you expect to get from this pension when you retire?

IF ASKED: IN TODAY'S PRICES  
INTERVIEWER: CODE TYPE OF ANSWER GIVEN

- 1 Total amount of pension
- 2 Annual Amount
- 3 Don't know

*IF answer given as a total amount or annual amount:*  
WpPAm = 1 OR 2

**WpPA**

ENTER AMOUNT  
Range: 0..9999997

ENDIF

*IF answer given as total amount and doesn't know or refuses to give amount: WpPAm = 1 AND (WpPA = DK OR RF)*

**WpTB**

Would it be...  
Brackets: (5000,15000,50000,100000)

*ELSEIF answer given as annual amount and doesn't know or refuses to give amount: (WpPAm = 2 AND (WpPA = DK OR RF))*

**WpAB**

Would it be...  
Brackets: (2500,5000,12500,50000)

*ELSEIF doesn't know or refuses to say how answer given:*  
WpPAm = 3 OR DK OR RF

**WpAB**

```
| | | Would it be...per year
| | | Brackets: (2500,5000,12500,50000)
| | | ENDIF
| | | ENDIF
| | | ENDIF
IF is currently receiving a pension from past scheme: WpRec = 1
| | | WpInf*
| | | Is the amount you receive from this pension continually
| | | adjusted to take account of inflation (sometimes called index-
| | | linked)?
| | | 1 Yes
| | | 2 No
| | | WpPay*
| | | Thinking about the last payment you received, what period did
| | | this cover?
| | | 1 One week
| | | 2 Two weeks
| | | 3 Three weeks
| | | 4 Four weeks
| | | 5 Calendar month
| | | 7 Two Calendar months
| | | 8 Eight times a year
| | | 9 Nine times a year
| | | 10 Ten times a year
| | | 13 Three months/13 weeks
| | | 26 Six months/26 weeks
| | | 52 One Year/12 months/52 weeks
| | | 90 Less than one week
| | | 95 One off/lump sum
| | | 96 None of these (EXPLAIN IN A NOTE)
| | | IF period given: WpPay = RESPONSE
| | | | | WpPyR*
| | | | | How much did you receive?
| | | | | Range: 0..999997
| | | | | ENDIF
| | | IF doesn't know or refuses to give period OR doesn't know or
| | | refuses to give amount: WpPay = DK OR RF OR WpPyR = DK OR RF
| | | | | IF period of payment is one week: WpPay = 1
| | | | | | | WpWb*
| | | | | | | Was it...
| | | | | | | Brackets: (25,75,150,600)
| | | | | ELSEIF period of payment is two weeks: WpPay = 2
| | | | | | | Wpfb*
| | | | | | | Was it...
| | | | | | | Brackets: (50,150,300,1200)
| | | ELSEIF period of payment is a month: WpPay = 4, 5
```



*IF is receiving a divorced/widow's pension: WpReN = RESPONSE*

Repeat WpPWP to WpWtx for up to 3 widow's/ex-spouse pensions

**WpPWP\***

Thinking about the last payment you received from *^this/the most important pension/next most important of these pensions* what period did this cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF period was given: WpPWP = RESPONSE*

**WpPWR\***

How much did you receive?

Range: 0..99997

*ENDIF*

*IF doesn't know or refuses to give amount OR doesn't know or refuses to give period: WpPWR = DK OR RF OR WpPWP = DK OR RF*

*IF period given is one week: WpPWP = 1*

**WpWWb\***

Was it...

Brackets: (25,75,150,600)

*ELSEIF period is two weeks: WpPWP = 2*

**WpWfb\***

Was it...

Brackets: (50,150,300,1200)

*ELSEIF period is a month: WpPWP = 4, 5*

**WpWmb\***

Was it...

Brackets: (100,300,600,2500)

*ELSEIF period is a year or one off lump sum: WpPWP = 52, 95*

**WpWyb\***

Was it...

Brackets: (1500,4000,8000,30000)

*ELSE*

**WpWob\***

Was it...per month  
Brackets: (100,300,600,2500)

ENDIF

ENDIF

**WpWtx\***

Is this before or after tax?  
1 Before tax  
2 After tax

IF expects to receive a divorced/widow's pension in the future:  
WpExW = 1

**WpWEx**

How much do you expect to get from (this pension/these pensions)  
when you retire?

IF ASKED: IN TODAY'S PRICES

CODE PERIOD COVERED

- 1 Total Amount
- 2 Annual Amount
- 3 Don't know

IF amount expects to get when retires given as total amount or annual  
amount: WpWEx = 1 OR 2

**WpExA**

ENTER AMOUNT  
Range: 0..99997

CHECK: IF amount expects to get when retires given in total amount  
and is more than £300,000 OR given as annual amount and is more than  
£100,000: (WpWEx = 1 AND WpExA > 300000) OR (WpWEx = 2 AND WpExA >  
100000), INTERVIEWER: "Are you sure? £^amount expects to get when  
retires seems high - please check."

ENDIF

IF amount given as total amount AND doesn't know or refuses to  
give amount: WpWEx = 1 AND (WpExA = DK OR RF)

**WpeTB**

Would it be...  
Brackets: (5000,15000,50000,100000)

ELSEIF answer given as annual amount AND doesn't know or refuses to  
give amount: WpWEx = 2 AND (WpExA = DK OR RF)

**WpeAB**

Would it be...  
Brackets: (2500,5000,12500,50000)

ELSEIF doesn't know or refuses to say how answer given: WpWEx = 3 OR DK  
OR RF

**WpeAB**

Would it be...per year  
Brackets: (2500,5000,12500,50000)

ENDIF

ENDIF

IF currently receiving a past pension or divorced/widow's pension:

WpRec = 1 OR WpPW = 1

**WpInfo**

Thinking about all the pensions that you are currently receiving, looking back do you feel you had enough information about how much you would receive from these pensions?

- 1 Yes
- 2 No

ENDIF

ENDIF

IF retired or semi-retired: WpDes = 1, 96

**WpRAge\***

You said earlier that you were ^retired/semi-retired, at what age did you retire?

ENTER AGE HERE

Range: 0..120

CHECK: IF age given is under 30: WpRAge <= 30, "This seems early (^age retired), can I check?"

IF has a past pension scheme: WpPrPE = 1 OR WpPePr = 1

**WpERet\***

Did you take early retirement, that is did you retire before the normal retirement age in your pension scheme?

- 1 Yes
- 2 No

IF has taken early retirement: WpERet = 1

**WpERP\***

When you first retired, did you retire on a ...READ OUT...

- 1 ... full pension,
- 2 reduced pension,
- 3 or, no pension?

**WpReas\***

SHOW CARD X

What were your reasons for taking early retirement?

CODE ALL THAT APPLY

- 1 Own ill health
- 2 Ill health of a relative/friend
- 3 Made redundant/dismissed/had no choice
- 4 Offered reasonable financial terms to retire early or take voluntary redundancy
- 5 Could not find another job
- 6 To spend more time with partner/ family
- 7 To enjoy life while still young and fit enough
- 8 Fed up with job and wanted a change
- 9 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance

- 95 Other (specify)
- 96 None of these (exclusive code)
- 97 SPONTANEOUS: Does not consider has retired early

IF WpReas = 95

**WpORea\***

INTERVIEWER WRITE IN OTHER REASON

Text: up to 20 characters

ENDIF

IF more than one reason given: WpReas > 1

**WpMRea\***

SHOW CARD X

What was your main reason for taking early retirement?

CODE ONE ONLY

- 1 Own ill health
- 2 Ill health of a relative/friend
- 3 Made redundant/dismissed/had no choice
- 4 Offered reasonable financial terms to retire early or take voluntary redundancy
- 5 Could not find another job
- 6 To spend more time with partner/ family
- 7 To enjoy life while still young and fit enough
- 8 Fed up with job and wanted a change
- 9 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these

CHECK: IF main reason wasn't given previously as a reason: WpMrea <> Wpreas, INTERVIEWER: "Main reason wasn't mentioned earlier. Please change!"

ENDIF

ENDIF

ENDIF

IF has not retired early OR doesn't consider has retired early OR has not had a pension scheme in the past: WpERet = 2 OR WpReas = 97 OR (WpPrPE = 2 OR WpPePr = 2)

**WpRRe\***

SHOW CARD Y

What were your reasons for retiring?

CODE ALL THAT APPLY

- 1 Reached retirement age
- 2 Own ill health
- 3 Ill health of a relative/friend
- 4 Made redundant/dismissed/had no choice
- 5 Could not find another job
- 6 To spend more time with partner/ family
- 7 To enjoy life while still young and fit enough
- 8 Fed up with job and wanted a change
- 9 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner

- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these (exclusive code)

*IF other reason for retiring: WpRRRe = 95*

**WpORRe\***

INTERVIEWER WRITE IN OTHER REASON

Text: up to 20 characters

*ENDIF*

*IF more than one reason for retiring given: WpRRRe > 1*

**WpMRRe\***

SHOW CARD Y

What was your main reason for retiring?

CODE ONE ONLY

- 1 Reached retirement age
- 2 Own ill health
- 3 Ill health of a relative/friend
- 4 Made redundant/dismissed/had no choice
- 5 Could not find another job
- 6 To spend more time with partner/ family
- 7 To enjoy life while still young and fit enough
- 8 Fed up with job and wanted a change
- 9 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these

CHECK: IF main reason was not given previously as a reason: WpMRRe  
<> WpRRRe, INTERVIEWER: "Main reason wasn't mentioned earlier. Please  
change!"

*ENDIF*

*IF retired because reached retirement age and didn't also say  
was made redundant: WpRRRe = 1 AND WpRRRe <> 4*

**WpWkR\***

Did you have the opportunity to work past retirement age?

- 1 Yes
- 2 No

*ENDIF*

*ENDIF*

*ENDIF*

NEW BLOCK

Medical insurance starts here (set by WpPHI)  
TIME

**WpPHI\***

Are you covered by private health insurance, whether in your own name or  
through another family member?

DON'T INCLUDE DENTAL OR FRIENDLY PLANS.

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INCLUDE COVER THROUGH EX-FAMILY MEMBERS IN CODE 2

- 1 Yes, in own name
- 2 Yes, through another family member
- 3 No, not insured

IF has private heath insurance: WpPHI = 1

IF in paid work or temporarily away and self-employed OR if not in paid work or temporarily away : (WpES = 2 AND (Wpactw = 1 OR 2)) OR (Wpactw <> 1 OR 2)

**WpHowU\***

How is this Health Insurance paid for?

- 1 Paid for by self
- 2 Paid for by someone else

IF heath insurance paid for by someone else: WpHowU = 2

**WpHLWho\***

WRITE IN WHO PAYS FOR THE INSURANCE

Text: up to 40 characters

ENDIF

ENDIF

IF an employee and currently in paid work: WpES = 1 AND Wpactw = 1, 2

**WpHowE\***

How is this Health Insurance paid for?

- 1 Pays for all or part of it directly
- 2 Employer deducts it from wages
- 3 Employer pays it fully as a benefit

ENDIF

IF respondent pays for own heath insurance: WpHowE = 1 OR

WpHowU = 1

**WpMHI\***

How much do you pay per month for this insurance?

Please include the contribution for all family members covered by insurance in your name.

WRITE IN AMOUNT

Range: 0..999997

CHECK: IF amount pays for medical insurance each month is greater than £10,000: WpMHI > 10000, INTERVIEWER: "Are you sure? £^amount pays for medical insurance each month seems high - please check."

IF doesn't know or refuses to give amount pays for medical insurance each month: WpMHI = DK OR RF

**WpMHIb\***

Is it...

Brackets: (500,1000,2000,5000)

ENDIF

ENDIF

*ENDIF*

**Income and Assets Module**

BLOCK IAA

TIME

Time at start of Income and Assets module (set by IaWork)

If person is living alone (from Household Demographics), questions go to respondent only.

If person is living as part of a married or cohabiting couple and has indicated finances are shared between the couple (from Household Demographics), questions go to respondent on behalf of the couple.

If person is living as part of a married or cohabiting couple and has indicated finances are not shared between the couple (from Household Demographics), questions go to each respondent separately.

**IaAsk**

Asking for partner in HH, too?

- 1 Yes
- 2 No

**IaWork\***

We are interested in how people are managing financially these days. The next questions are about types of income *^you/you and your husband/wife/partner* may receive. We may have asked *^you/you or your husband/wife/partner* some of the details earlier but it is important for us to check that we understand your situation correctly. Did *^you/you or your husband/wife/partner* do any work for pay in the last year (that is since *^date a year ago*)?

- 1 Yes
- 2 No

*IF worked for pay in the last year: IaWork = 1*

**IaSInc\***

About how much wage and salary income did *^you/you and your husband/wife/partner* receive in the last year before taxes and other deductions?

Range: 0..999997

CHECK: IF earned 200000 more in last year:  $IaSInc > 200000$ , INTERVIEWER: "Are you sure? *^Response at IaSInc* seems high - please check."

*IF doesn't know or refuses to give salary income in last year: IaSInc = DK OR IaSInc = RF*

**IaSincB\***

Was it...

Brackets:(10000, 20000, 35000, 100000)

ENDIF

ENDIF

**IaSPen\***

Did *^you/you or your husband/wife/partner* receive any money from a state pension in the last year (that is since *^date one year ago*)?

INCLUDE BASIC STATE PENSION AND SERPS

- 1 Yes
- 2 No

IF received money from state pension last year and if responding for partner as well: IaSPen = 1 AND IAask = 1

**IaSPW\***

Which of you received the state pension in the last year?

- 1 Respondent only
- 2 Spouse/partner only
- 3 Both

CHECK: IF respondent or both respondent and spouse/partner received state pension in the last year and respondent not retirement age: (IaSPW = 1 OR 3) AND ((ISex = Male AND IAgeof < 65) OR (ISex = Female AND IAgeof < 60)), INTERVIEWER: "Respondent says they are receiving the state pension before the age of retirement, please check. (^Respondent's name is only ^respondent's age)

CHECK: IF spouse/partner or both received state pension in the last year and spouse/partner not at retirement age: (IaSPW = 2 OR 3) AND ((DMSex[icouplen] = Male AND dmAge[icouplen] < 65) OR (DMSex[icouplen] = Female AND dmAge[icouplen] < 60)), INTERVIEWER: "Respondent says they are receiving the state pension before the age of retirement, please check (^spouse/partner's name is only ^spouse/partner's age)"

ENDIF

IF received state pension last year and not responding for spouse/partner OR if responding on behalf of couple and respondent or respondent and spouse/partner received state pension last year: (IaSPen = 1 AND IAask <> 1) OR (IaSPW = 1 OR 3)

**IasPa\***

How much do you receive from the state pension?

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

IF valid response regarding period of state pension payment: IasPa = RESPONSE

**IaPAM\***

INTERVIEWER: ENTER AMOUNT

IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER TOTAL AMOUNT RECEIVED HERE

Range: 0..99997

CHECK: IF amount of state pension is more than £300 per week, more than £600 every two weeks, more than £1200 per month or more than £1500 per year: IaPAM <> 99997 AND (IasPa = 1 AND IaPAM > 300) OR (IasPa = 2

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AND IaPAM > 600) OR (IasPa = 4 or 5 AND IaPAM > 1200) OR (IasPa = 3  
or 7..26, 52, 90..95 AND IaPAM > 15000), INTERVIEWER: "Are you sure?  
^Reponse at IaPAM seems high - please check."

ENDIF

IF doesn't know, or refuses to give amount or frequency of state pension  
payments: (IasPa = DK OR IasPa = RF) OR (IaPAM = DK OR IaPAM = RF)

IF receives state pension once a week: IasPa = 1

**IaSPwB\***

Did you receive...

Brackets: (50, 75, 100, 150)

ELSEIF receives state pension every two weeks: IasPa = 2

**IaSPfB\***

Did you receive...

Brackets: (100, 150, 200, 300)

ELSEIF receives state pension every four weeks or one month: IasPa = 4

**IaSPmB\***

Did you receive...

Brackets: (200, 300, 400, 600)

ELSEIF receives state pension once a year or as a lump sum: IasPa = 52  
Or IasPa = 95

**IaSPyB\***

Did you receive...

Brackets: (2500, 4000, 5000, 7500)

ELSE

**IaSPoB\***

Did you receive per month...

Brackets: (200, 300, 400, 600)

ENDIF

ENDIF

**IaPly\***

Did you start receiving this pension in the last year (that is since  
^date a year ago)?

- 1 Yes
- 2 No

IF started receiving state pension last year: IaPly = 1

**IaPlyw\***

Which month did you start receiving it?

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July

- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

ENDIF

ENDIF

IF spouse/partner only OR both receiving state pension: IaSPW = 2 OR 3

**IaSPp\***

How much does ^husband/wife/partner receive from the state pension?

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

IF valid response in IaSPp: IaSPp = RESPONSE

**IaPPAm\***

INTERVIEWER: ENTER AMOUNT

IF DK AMOUNT BECAUSE PAID WITH BENEFITS, ENTER TOTAL AMOUNT RECEIVED  
HERE

Range: 0..99997

CHECK: IF amount of state pension is more than £300 per week, more than  
£600 every two weeks, more than £1200 per month or more than £1500 per  
year: IaPPAm <> 99997 AND IaSPp = OneWeek AND IaPPAm > 300) OR (IaSPp  
= TwoWeek AND IaPPAm > 600) OR (IaSPp = 4 or 5 AND IaPPAm > 1200) OR  
(IaSPp = 3 or 7..26, 52, 90..95 AND IaPPAM > 15000), INTERVIEWER: "Are  
you sure? ^Response at IaPPAm seems high - please check."

ENDIF

IF doesn't know or refused to give amount or frequency of state pension:  
(IaSPp = DK OR IaSPp = RF) OR (IaPPAm = DK OR IaPPAm = RF)

IF receives state pension once a week: IaSPp = 1

**IaPPwB\***

Did you receive...

Brackets: (50, 75, 100, 150)

*ELSEIF receives state pension every two weeks: IaSPp = 2*

**IaPPfB\***

Did you receive...

Brackets: (100, 150, 200, 300)

*ELSEIF receives state pension every four weeks, one month: IaSPp = 4, 5*

**IaPPmB\***

Did you receive...

Brackets: (200, 300, 400, 600)

*ELSEIF receives state pension once a year Or as a lump sum: IaSPp = 52  
OR 95*

**IaPPyB\***

Did you receive...

Brackets: (2500, 4000, 5000, 7500)

*ELSE*

**IaPPoB\***

Did you receive per month...

Brackets: (200, 300, 400, 600)

*ENDIF*

*ENDIF*

**IaPlyp\***

Did *^husband/wife/partner* start receiving this pension in the last year  
(that is since *^date one year ago*)?

- 1 Yes
- 2 No

*IF started receiving the pension in the last year: IaPlyp = 1*

**IaPlw\***

Which month did *^husband/wife/partner* start receiving it?

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

*ENDIF*

*ENDIF*

**IaPPen\***

Did *^you/you or your husband/wife/partner* receive any money from a personal  
or employer pension in the last year (that is since *^date one year ago*)?

- 1 Yes

2 No

*IF received money from personal or employer pension in the last year:*

*IaPPen = 1*

**IaPPEI\***

About how much income did ^you/you and your husband/wife/partner receive in the last year from personal or employer pensions before taxes and other deductions?

DO NOT INCLUDE ANY LUMP SUMS RECEIVED

Range: 0..999997

Check: IF received more than £60000 in the last year: *IaPPEI > 60000*, INTERVIEWER: "Are you sure? ^Response at *IaPPEI* seems high - please check."

*IF doesn't know or refuses to give amount of personal or employer pension received in the last year: IaPPEI = DK OR IaPPEI = RF*

**IaPPEiB\***

Did you receive...

Brackets: (1500, 4000, 8000, 30000)

ENDIF

ENDIF

**IaAnIn\***

Apart from anything you've already told me about, did ^you/you or your husband/wife/partner receive any annuity income in the last year (that is since ^date one year ago)?

PRESS F9 FOR A DEFINITION OF ANNUITY INCOME: "Annuity income is when you make a lump sum payment to a financial institution and in return they give you a regular income for the rest of your life".

1 Yes

2 No

*IF received annuity income and respondent answering on behalf of couple:*

*IaAnIn = 1 AND IAask = 1*

**IaAIly\***

Which of you received annuity income in the last year?

1 Respondent only

2 Spouse/partner only

3 Both

ENDIF

*IF either respondent only or both respondent and spouse/partner received annuity income last year, OR respondent not answering on behalf of couple and received annuity income last year: (IaAIly =1 OR 3) OR (IaAnIn = 1 AND IAask <> 1)*

**IaAIIm\***

How much annuity income did you receive in the last year after tax?

Range: 0..999997

CHECK: IF received more than £30000 annuity income in the last year: *IaAIIm > 30000*, INTERVIEWER: Are you sure? ^Response at *IaAIIm* seems high - please check.

| IF doesn't know or refuses to give amount of annuity income: IaAIm = DK  
 | OR IaAIm = RF

| **IaAimb**

| Did you receive...

| Brackets: (400, 1000, 2000, 15000)

| ENDIF

ENDIF

IF spouse/partner only received annuity income in last year: IaAIly = 2

| **IaAIp**

| How much annuity income did ^husband/wife/partner receive in the last  
 | year after tax?

| Range: 0..999997

| CHECK: IF received more than £30000 annuity income in last year: IaAIp >  
 | 30000, INTERVIEWER: "Are you sure? ^Response at IaAIp seems high - please  
 | check."

| IF doesn't know or refuses to give amount of annuity income in last year:  
 | IaAIp = DK OR IaAIp = RF

| **IaAipb**

| Did ^husband/wife/partner receive...

| Brackets: (400, 1000, 2000, 15000)

| ENDIF

ENDIF

NEW BLOCK - BLOCK IAB

**Iahdb**

SHOW CARD Z

Have ^you/you or your husband/wife/partner received any of these health or  
 disability benefits in the last year (that is since ^date one year ago)?

INCLUDE ANY CURRENTLY RECEIVING

- 1 Yes
- 2 No

IF received health or disability benefits in the last year: Iahdb = 1

| **IahdR\***

| SHOW CARD Z

| Which of these health or disability benefits have you received in the  
 | last year?

| INCLUDE ANY CURRENTLY RECEIVING

| PROBE: What others?

| CODE ALL THAT APPLY

- | 1 Incapacity Benefit previously Invalidity Benefit
- | 2 Severe Disablement Allowance SDA
- | 3 Statutory sick pay SSP
- | 4 Attendance Allowance
- | 5 Disability Living Allowance
- | 6 Industrial Injuries Disablement Benefit
- | 7 War Disablement Pension or War Widow's Pension
- | 8 Invalid Care Allowance
- | 9 Disabled person's tax credit formerly Disability Working Allowance

95 Some other benefit for people with disabilities SPECIFY  
 96 None of these [Exclusive code]

*IF received some other benefit for people with disability: IaHdR = 95*

**IaHdRo\***

INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT  
 Text: up to 40 characters

*ENDIF*

*IF valid response regarding disability benefit and response is not None  
 of these: IaHdR = RESPONSE AND IaHdR <> 96*

**IaHdN\***

SHOW CARD Z

Which of these health or disability benefits are you receiving at the  
 moment?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Incapacity Benefit previously Invalidity Benefit
- 2 Severe Disablement Allowance SDA
- 3 Statutory sick pay SSP
- 4 Attendance Allowance
- 5 Disability Living Allowance
- 6 Industrial Injuries Disablement Benefit
- 7 War Disablement Pension or War Widow's Pension
- 8 Invalid Care Allowance
- 9 Disabled person's tax credit formerly Disability Working Allowance
- 95 Some other benefit for people with disabilities SPECIFY
- 96 None of these [Exclusive code]

CHECK: For each benefit given at IaHdN that was not given at IaHdR,  
 INTERVIEWER: ^benefit at IaHdN wasn't given at IaHdR - Please change!

*ENDIF*

*IF valid response at IaHdR and IaHdN and response is not None: (IaHdR =  
 RESPONSE and IaHdN = RESPONSE) AND RESPONSE <> 96*

**IaT\***

Benefit block type  
 Range: 0..97

Repeat IaP to IaBM for each benefit received last year OR that is  
 currently being received (mentioned at IaHdR\*)

IF not currently receiving benefit, ^lasttime = lasttime  
 ELSEIF currently receiving benefit, ^usually = usually

**IaP\***

How much did you ^usually receive from ^benefit ^lasttime  
 CODE PERIOD COVERED

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year

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10 Ten times a year  
13 Three months/13 weeks  
26 Six months/26 weeks  
52 One Year/12 months/52 weeks  
90 Less than one week  
95 One off/lump sum  
96 None of these [EXPLAIN IN A NOTE]

*IF gave valid period response: IaP = RESPONSE*

**IaA\***

INTERVIEWER: ENTER AMOUNT.  
IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER  
TOTAL AMOUNT RECEIVED HERE  
ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE  
Range: 0..9997

*ENDIF*

*IF doesn't know or refuses to give amount or frequency of benefit  
received: (IaP = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)*

*IF receives benefit once a week: IaP = 1*

**IawB\***

Did you receive...  
Brackets: (50, 75, 100, 150)

*ELSEIF receives benefit every two weeks: IaP = 2*

**Iafb\***

Did you receive...  
Brackets: (100, 150, 200, 300)

*ELSEIF receives benefit every four weeks OR one month: IaP = 4 OR 5*

**IamB\***

Did you receive...  
Brackets: (200, 300, 400, 600)

*ELSEIF receives benefit once a year OR as a lump sum: IaP = 52 Or IaP  
= 95*

**IayB\***

Did you receive...  
Brackets: (2500, 3750, 5000, 7500)0

*ELSE*

**Iaob\***

Did you receive per month...  
Brackets: (200, 300, 400, 600)

*ENDIF*

*ENDIF*

*IF respondent is currently receiving benefits: IaT = 1, 3, 5 Or 7*

**IALY\***

Did you start receiving this benefit in the last year, that is

since ^date one year ago?

- 1 Yes
- 2 No

IF started receiving this benefit in the last year: IALY = 1

**IaLM\***

Which month did you start receiving it?

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

ENDIF

ELSEIF not receiving benefits

**IaB\***

For how many weeks or months in the last year, that is since ^date one year ago, did you receive ^benefit?

- 1 Answer given in weeks
- 2 Answer given in months

IF response is given in weeks: IaB = 1

**IaBW\***

INTERVIEWER: ENTER NUMBER OF WEEKS

Range: 0..52

ENDIF

IF response is given in months: IaB = 2

**IaBM\***

INTERVIEWER: ENTER NUMBER OF MONTHS

Range: 1..12

ENDIF

ENDIF

ENDIF

IF answering as part of a couple: IAAsk = Yes

**Iahdp\***

SHOW CARD Z

Which, if any, of these health or disability benefits has ^husband/wife/partner received in the last year?

INCLUDE ANY CURRENTLY RECEIVING

PROBE: What others?

CODE ALL THAT APPLY

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- 1 Incapacity Benefit previously Invalidity Benefit
- 2 Severe Disablement Allowance SDA
- 3 Statutory sick pay SSP
- 4 Attendance Allowance
- 5 Disability Living Allowance
- 6 Industrial Injuries Disablement Benefit
- 7 War Disablement Pension or War Widow's Pension
- 8 Invalid Care Allowance
- 9 Disabled person's tax credit formerly Disability Working Allowance
- 95 Some other benefit for people with disabilities SPECIFY
- 96 None of these [Exclusive code]

*IF received some other benefit for people with disabilities: Iahdp = 95*

**Iahdpo\***

INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT  
Text: up to 40 characters

*ENDIF*

*IF valid response in Iahdp and response is not None: Iahdp = RESPONSE  
AND <> 96*

**IahdPn\***

SHOW CARD Z

Which of these health and disability benefits is  
^husband/wife/partner receiving at the moment?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Incapacity Benefit previously Invalidity Benefit
- 2 Severe Disablement Allowance SDA
- 3 Statutory sick pay SSP
- 4 Attendance Allowance
- 5 Disability Living Allowance
- 6 Industrial Injuries Disablement Benefit
- 7 War Disablement Pension or War Widow's Pension
- 8 Invalid Care Allowance
- 9 Disabled person's tax credit formerly Disability Working Allowance
- 95 Some other benefit for people with disabilities SPECIFY
- 96 None of these [Exclusive code]

CHECK: For each benefit given at IahdPn that was not given at IahdP,  
INTERVIEWER: ^benefit at IahdPn wasn't given at IahdP. Please change!

*ENDIF*

*IF gave valid response at Iahdp and IahdPn and did not answer None at  
Iahdp: (Iahdp = RESPONSE AND IahdPn = RESPONSE) AND Iahdp <>96*

Repeat Iap to IaBM for each benefit mentioned at IahdP\* that has been  
received last year OR is being received

**IaP\***

How much did you ^usually receive from ^benefit ^lasttime

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month

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7 Two Calendar months  
 8 Eight times a year  
 9 Nine times a year  
 10 Ten times a year  
 13 Three months/13 weeks  
 26 Six months/26 weeks  
 52 One Year/12 months/52 weeks  
 90 Less than one week  
 95 One off/lump sum  
 96 None of these [EXPLAIN IN A NOTE]

IF gave valid period response: IaP = RESPONSE

**IaA\***

INTERVIEWER: ENTER AMOUNT.

/ IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER  
 TOTAL AMOUNT RECEIVED HERE

ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE

Range: 0..9997

/ ENDIF

/ IF doesn't know or refuses to give amount or frequency of benefit:

| (IaP = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)

/ IF receives benefit once week: IaP = 1

**IawB\***

Did you receive...

Brackets: (50, 75, 100, 150)

ELSEIF receives benefit every two weeks: IaP = 2

**Iafb\***

Did you receive...

Brackets: (100, 150, 200, 300)

ELSEIF receives benefit every four weeks or one month: IaP = 4 OR 5

**Iamb\***

Did you receive...

Brackets: (200, 300, 400, 600)

ELSEIF receives benefit once a year or as a lump sum: IaP = 52 Or  
 IaP = 95

**IayB\***

Did you receive...

Brackets: (2500, 3750, 5000, 7500)0)

ELSE

**Iaob\***

Did you receive per month...

Brackets: (200, 300, 400, 600)

ENDIF

/ ENDIF

```
| / | ENDIF
|
| IF respondent is currently receiving benefits: IaT = 1, 3, 5 Or 7
|
|   IaLY*
|   Did you start receiving this benefit in the last year, that is
|   since ^date one year ago?
|   1   Yes
|   2   No
|
|   IF started receiving this benefit in the last year: IALY = 1
|
|     IaLM*
|     Which month did you start receiving it?
|     1   January
|     2   February
|     3   March
|     4   April
|     5   May
|     6   June
|     7   July
|     8   August
|     9   September
|     10  October
|     11  November
|     12  December
|
|   ENDIF
|
| ELSEIF not currently receiving benefits
|
|   IaB*
|   For how many weeks or months in the last year, that is since ^date
|   one year ago, did you receive ^benefit?
|   1   Answer given in weeks
|   2   Answer given in months
|
|   IF response is given in weeks: IaB = 1
|
|     IaBW*
|     INTERVIEWER: ENTER NUMBER OF WEEKS
|     Range: 0..52
|
|   ENDIF
|
|   IF response is given in months: IaB = 2
|
|     IaBM*
|     INTERVIEWER: ENTER NUMBER OF MONTHS
|     Range: 1..12
|
|   ENDIF
|
| ENDIF
|
| ENDIF
|
| ENDIF
|
| IaBeB*
| SHOW CARD AA
```

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Have ^you/you or your husband/wife/partner received any of these benefits in the last year (that is since ^date one year ago)?

INCLUDE ANY CURRENTLY RECEIVING

- 1 Yes
- 2 No

IF received benefits in the last year: IaBeB = 1

IaBeR\*

SHOW CARD AA

Which of these benefits have you received in the last year?

INCLUDE ANY CURRENTLY RECEIVING

PROBE: What others?

CODE ALL THAT APPLY

- 1 Income Support or Minimum Income Guarantee MIG
- 2 Working Families Tax Credit formerly Family Credit
- 3 Job-seeker's Allowance formerly Unemployment Benefit
- 4 Guardian's Allowance
- 5 Widow's pension/Widowed mother's allowance/Widowed Parent's allowance/Bereavement allowance
- 6 Child Benefit
- 95 Some other State Benefit SPECIFY
- 96 None of these [Exclusive code]

IF response is other: IaBeR = 95

IaBeRo\*

INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT

Text: up to 40 characters

ENDIF

IF response at IaBeR and response is not None: IaBeR = RESPONSE AND IaBeR <> 96

IaBeN\*

SHOW CARD AA

Which of these benefits are you receiving at the moment?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Income Support or Minimum Income Guarantee MIG
- 2 Working Families Tax Credit formerly Family Credit
- 3 Job-seeker's Allowance formerly Unemployment Benefit
- 4 Guardian's Allowance
- 5 Widow's pension/Widowed mother's allowance/Widowed Parent's allowance/Bereavement allowance
- 6 Child Benefit
- 95 Some other State Benefit SPECIFY
- 96 None of these [Exclusive code]

CHECK: For each benefit given at IaBeN that was not given at IaBeR, INTERVIEWER: ^benefit at IaBeN wasn't given at IaBeR - Please change!

ENDIF

IF valid response at IaBeR and at IaBeN and response is not None: (IaBeR = RESPONSE and IaBeN = RESPONSE) AND RESPONSE <> 96

Repeat IaP\* to IaBM\* for each benefit mentioned at IaBeR\* that has been received OR is currently being received

**IaP\***

How much did you ^usually receive from ^benefit ^lasttime

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]

*IF gave valid response regarding period of benefit: IaP = RESPONSE*

**IaA\***

INTERVIEWER: ENTER AMOUNT.

IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER

TOTAL AMOUNT RECEIVED HERE

ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE

Range: 0..9997

*ENDIF*

*IF doesn't know or refuses to give amount or frequency of benefit: (IaP = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)*

*IF receives benefit once a week: IaP = 1*

**IawB\***

Did you receive...

Brackets: (50, 75, 100, 150)

*ELSEIF receives benefit every two weeks: IaP = 2*

**Iafb\***

Did you receive...

Brackets: (100, 150, 200, 300)

*ELSEIF receives benefit every four weeks or one month: IaP = 4 OR 5*

**Iamb\***

Did you receive...

Brackets: (200, 300, 400, 600)

*ELSEIF receives benefit once a year or as a lump sum: IaP = 52 Or IaP = 95*

**IayB\***

Did you receive...

Brackets: (2500, 3750, 5000, 7500)0)

*ELSE*

**Iaob\***

```

| | Did you receive per month...
| | Brackets: (200, 300, 400, 600)
| |
| | ENDIF
| |
| | ENDIF
| |
| | IF respondent is currently receiving benefits: IaT = 1, 3, 5 Or 7
| |
| | IaLY*
| | Did you start receiving this benefit in the last year, that is
| | since ^date one year ago?
| | 1 Yes
| | 2 No
| |
| | IF started receiving this benefit in the last year: IALY = 1
| |
| | IaLM*
| | Which month did you start receiving it?
| | 1 January
| | 2 February
| | 3 March
| | 4 April
| | 5 May
| | 6 June
| | 7 July
| | 8 August
| | 9 September
| | 10 October
| | 11 November
| | 12 December
| |
| | ENDIF
| |
| | ELSEIF not currently receiving benefits
| |
| | IaB*
| | For how many weeks or months in the last year, that is since ^date
| | one year ago, did you receive ^benefit?
| | 1 Answer given in weeks
| | 2 Answer given in months
| |
| | IF response is given in weeks: IaB = 1
| |
| | IaBW*
| | INTERVIEWER: ENTER NUMBER OF WEEKS
| | Range: 0..52
| |
| | ENDIF
| |
| | IF response is given in months: IaB = 2
| |
| | IaBM*
| | INTERVIEWER: ENTER NUMBER OF MONTHS
| | Range: 1..12
| |
| | ENDIF
| |
| | ENDIF
| |
| | ENDIF

```

*IF answering on behalf of couple: QIAa.IAAsk = Yes*

**IaBeP\***

SHOW CARD AA

Which, if any, of these benefits has ^husband/wife/partner received in the last year?

INCLUDE ANY CURRENTLY RECEIVING

PROBE: What others?

CODE ALL THAT APPLY

- 1 Income Support or Minimum Income Guarantee MIG
- 2 Working Families Tax Credit formerly Family Credit
- 3 Job-seeker's Allowance formerly Unemployment Benefit
- 4 Guardian's Allowance
- 5 Widow's pension/Widowed mother's allowance/Widowed Parent's allowance/Bereavement allowance
- 6 Child Benefit
- 95 Some other State Benefit SPECIFY
- 96 None of these [Exclusive code]

*IF response is Other: IaBeP = 95*

**IaBepo\***

INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT  
STRING[40]

ENDIF

*IF response valid response and response is not None: IaBeP = RESPONSE  
AND IaBeP <> 96*

**IaBePn\***

SHOW CARD AA

Which of these benefits is ^husband/wife/partner receiving at the moment?

PROBE: What others?

CODE ALL THAT APPPLY

- 1 Income Support or Minimum Income Guarantee MIG
- 2 Working Families Tax Credit formerly Family Credit
- 3 Job-seeker's Allowance formerly Unemployment Benefit
- 4 Guardian's Allowance
- 5 Widow's pension/Widowed mother's allowance/Widowed Parent's allowance/Bereavement allowance
- 6 Child Benefit
- 95 Some other State Benefit SPECIFY
- 96 None of these [Exclusive code]

CHECK: For each benefit given at IaBePn and not given at IaBeP,  
INTERVIEWER: ^benefit at IaBePn wasn't given at IaBeP Please change!

*IF valid response at IaBeP and at IaBePn and response is not None at  
IaBeP: (IaBeP = RESPONSE and IaBePn = RESPONSE) AND IaBeP <> 95*

Repeat IaP\* to IaBM\* for each benefit mentioned at IaBeP that has been received Or is currently being received.

**IaP\***

How much did you ^usually receive from ^benefit ^lasttime

CODE PERIOD COVERED

- 1 One week
- 2 Two weeks

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- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]

| *IF gave valid response period of benefit: IaP = RESPONSE*

| **IaA\***

| INTERVIEWER: ENTER AMOUNT.

| *IF DK AMOUNT BECAUSE RECEIVED WITH OTHER BENEFITS, ENTER  
| TOTAL AMOUNT RECEIVED HERE  
| ENTER 9997 IF AMOUNT ALREADY COUNTED ELSEWHERE  
| Range: 0..9997*

| *ENDIF*

| *IF doesn't know or refuses to give amount or frequency of benefit:  
| (IaP = DK OR IaP = RF) OR (IaA = DK OR IaA = RF)*

| *IF receives benefit once a week: IaP = 1*

| **IawB\***

| Did you receive...

| Brackets: (50, 75, 100, 150)

| *ELSEIF receives benefit every two weeks: IaP = 2*

| **Iafb\***

| Did you receive...

| Brackets: (100, 150, 200, 300)

| *ELSEIF receives benefit every four weeks or one month: IaP = 4 OR  
| 5*

| **Iamb\***

| Did you receive...

| Brackets: (200, 300, 400, 600)

| *ELSEIF receives benefit once a year or as a lump sum: IaP = 52 Or  
| IaP = 95*

| **IayB\***

| Did you receive...

| Brackets: (2500, 3750, 5000, 7500)0)

| *ELSE*

| **Iaob\***

| Did you receive per month...

| Brackets: (200, 300, 400, 600)

| *ENDIF*

| |  
| | / ENDIF

| / / ENDIF

| IF respondent is currently receiving benefits: IaT = 1, 3, 5 Or 7

| | **IaLY\***

| | Did you start receiving this benefit in the last year, that is since ^date one year ago?

- | | 1 Yes  
| | 2 No

| | IF response is yes: IaLY = 1

| | | **IaLM\***

| | | Which month did you start receiving it?

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

| | ENDIF

| ELSEIF not currently receiving benefits

| | **IaB\***

| | For how many weeks or months in the last year, that is since ^date one year ago, did you receive ^benefit?

- | | 1 Answer given in weeks  
| | 2 Answer given in months

| | IF response is given in weeks: IaB = 1

| | | **IaBW\***

| | | INTERVIEWER: ENTER NUMBER OF WEEKS

| | | Range: 0..52

| | ENDIF

| | IF response is given in months: IaB = 2

| | | **IaBM\***

| | | INTERVIEWER: ENTER NUMBER OF MONTHS

| | | Range: 1..12

| | ENDIF

| | ENDIF

| ENDIF

| IF respondent's age is 60 or over OR if person is answering on behalf

```

| | of the couple and the spouse/partner is 60 or over: (IAgeOf >= 60) OR
| | (QIAa.IAAsk = Yes AND DmAge[icouplen >= 60)
| |
| | IaFuel
| | Did ^you/you or your husband/wife/partner receive a Winter Fuel
| | Payment in the last year (that is since ^date one year ago)?
| | 1 Yes
| | 2 No
| |
| | ENDIF
| |
| | ENDIF
| |
| | ENDIF

```

NEW BLOCK - IAC

TIME

Time at start of financial assets section (set by IaFAInt)

IF person is married or cohabiting and respondent and partner/spouse are each receiving IA separately: IF (Icouple = married OR Icouple = cohabit) AND (IAskIA = Yes) AND (ICAskIA = Yes), ^soletxt = "Please include only savings and investments held in your sole name."

**IaFAInt\***

Savings and Investments are an important part of some household's finances. The next questions ask about a number of different kinds of savings or investments ^you/you or your husband/wife/partner may have. ^soletxt Press 1 and Enter to continue

**IaSI\***

SHOW CARD BB

Which, if any, of these savings and investments do ^you/you or your husband/wife/partner have?

PROBE: What others?

CODE TESSA-ONLY ISA'S (TOISA'S) AS ISA'S

CODE ALL THAT APPLY

- 1 Current Account at a bank, building society or elsewhere
- 2 Savings Account at a bank, building society or elsewhere
- 3 TESSA
- 4 ISA
- 5 Premium Bonds
- 6 National Savings Accounts or Certificates
- 7 PEP
- 8 Stocks and/or Shares
- 9 Share Options/Employee share ownership
- 10 Share clubs
- 11 Unit or Investment Trusts
- 12 Bonds and Gilts (government or corporate)
- 95 Other Savings or Investments
- 96 None of these [Exclusive code]

IF holds current or savings accounts at a bank, building society or elsewhere: IaSI = 1 OR 2

```

| | IF holds current and savings accounts at a bank, building society or
| | elsewhere: IaSI = 1 AND 2, ^savtxt = current and savings account(s) AND
| | ^odtxt = IF CURRENT ACCOUNT OVERDRAWN, ENTER AMOUNT IN SAVINGS ACCOUNT
| | ONLY
| | ELSEIF holds savings account only at a bank, building society or

```

elsewhere: IaSI = 2, ^savgtxt = savings account(s)  
 ELSE: ^savgtxt = current account(s) AND ^odtxt = ENTER `0` IF  
 OVERDRAWN

**IaSava\***

In total, how much do ^you/you and your husband/wife/partner have in  
 your ^savgtxt (at the bank, building society or elsewhere)?

^odtxt

Range: 0..9999997

CHECK: IF has savings of more than £300000: IaSava > 300000, INTERVIEWER:  
 "Are you sure? ^Response at IaSava seems high - please check."

IF doesn't know or refuses to give amount of savings: IaSava = DK OR  
 IaSava = RF

**IaSavab\***

Do ^you/you and your husband/wife/partner have...

Brackets: (1000, 5000, 20000, 150000)

ENDIF

**IaSint\***

About how much interest did ^you/you and your husband/wife/partner  
 receive from (this/these) account(s) in the last year after tax?

Range: 0..99997

CHECK: IF received more than £15000 interest last year: IaSint > 15000,  
 INTERVIEWER: "Are you sure? ^Response at IaSint seems high - please  
 check."

IF doesn't know or refuses to give amount of interest received last year:  
 IaSint = DK OR IaSint = RF

**IaSintB\***

Did ^you/you and your husband/wife/partner receive...

Brackets: (10, 25, 100, 500, 7500)

ENDIF

ENDIF

IF has Tessa: IaSI = 3

**IaTI\***

How much do ^you/you and your husband/wife/partner have in your  
 TESSA's?

Range: 0..99997

CHECK: IF has more than £100000 in TESSA's: IaTI > 100000, INTERVIEWER:  
 "Are you sure? ^Response at IaTI seems high - please check."

IF doesn't know or refuses to give amount in TESSA's: IaTI = DK OR IaTI =  
 RF)

**IaTIB\***

Do ^you/you and your husband/wife/partner have...

Brackets: (5000, 10000, 20000, 50000)

ENDIF

**IaTii\***

About how much interest did *^you/you and your husband/wife/partner* receive from these accounts in the last year?

Range: 0..9997

CHECK: IF received more than £8000 interest last year:  $IaTii > 8000$ ,  
INTERVIEWER: "Are you sure? *^Response at IaTii* seems high - please check."

*IF doesn't know or refuses to give amount of interest received last year:*  
 $IaTii = DK$  OR  $IaTii = RF$

**IaTiib\***

Did *^you/you and your husband/wife/partner* receive...

Brackets: (250, 500, 1000, 4000)

ENDIF

ENDIF

*IF has an Isa: IaSI = 4*

**IaIsa\***

Which of the following do *^you/you and your husband/wife/partner* have in your ISA(s) ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY...

- 1 ... cash?
- 2 ... life insurance?
- 3 ... stocks and shares?

*IF has cash in ISA: IaIsa = 1*

**IaCIsa\***

How much do *^you/you and your husband/wife/partner* currently have in the cash components of your ISA(s)?

Range: 0..999997

CHECK: IF has more than £40000 in cash components of ISA(s):  $IaCIsa > 40000$ ,  
INTERVIEWER: "Are you sure? *^Response at IaCIsa* seems high - please check."

*IF doesn't know or refuses to give amount of cash in ISA(s): IaCIsa = DK* OR  $IaCIsa = RF$

**IaCisab\***

Do *^you/you and your husband/wife/partner* currently have...

Brackets: (5000, 10000, 15000, 20000)

ENDIF

ENDIF

*IF has life insurance in ISA: IaIsa = 2*

**IaLIsa\***

How much is the life-insurance component of *^your/your and your husband's/wife's/partner's* ISA(s) currently worth?

Range: 0..999997

CHECK: IF has more than £20000 in the life-insurance component of ISA:  
 $IaLIsa > 20000$ , INTERVIEWER: "Are you sure? *^Response at IaLIsa* seems high - please check."

*IF doesn't know or refuses to give amount of life insurance component in ISA: IaLIsa = DK OR IaLIsa = RF*

**IaLIsab\***

Is it worth...

Brackets: (2000, 4000, 7500, 10000)

ENDIF

ENDIF

*IF has stocks or shares in ISA: IaIsa = 3*

**IaSIsa\***

How much is the stocks and shares component of your and ^your husband's/wife's/partner's ISA(s) currently worth?

Range: 0..999997

CHECK: IF has more than £100000 in the stocks and shares component of ISA: IaSIsa > 100000, INTERVIEWER: "Are you sure? ^Response at IaSIsa seems high - please check."

*IF doesn't know or refuses to give amount in stocks and shares component of ISA: IaSIsa = DK OR IaSIsa = RF*

**IaSIsab\***

Is it worth...

Brackets: (5000, 10000, 25000, 50000)

ENDIF

ENDIF

**IaIsaD\***

Not including any income that was re-invested, about how much income did ^you/you and your husband/wife/partner receive from (this/these) ISA(s) in the last year?

Range: 0..99997

CHECK: IF received more than £4000 last year from this/these ISA(s): IaIsaD > 4000, INTERVIEWER: "Are you sure? ^Response at IaIsaD seems high - please check."

*IF doesn't know or refuses to give amount of income received: IaIsaD = DK OR IaIsa = RF*

**IaIsaDb\***

Brackets: (100, 150, 300, 2000)

ENDIF

ENDIF

*IF has premium bonds: IaSI = 5*

**IaNPB\***

How much do ^you/you and your husband/wife/partner have in Premium Bonds?

Range: 0..9999997

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CHECK: IF has more than £10000 in premium bonds:  $IaNPB > 10000$ ,  
INTERVIEWER: "Are you sure? ^Response at  $IaNPB$  seems high - please  
check."

IF doesn't know or refuses to give amount in premium bonds:  $IaNPB = DK$  OR  
 $IaNPB = RF$

**$IaNPBB^*$**

Do ^you/you and your husband/wife/partner have...

Brackets: (100, 200, 500, 5000)

ENDIF

**$IaNPBP^*$**

How much prize income did ^you/you and your husband/wife/partner receive  
from these bonds in the last year?

Range: 0..999997

CHECK: IF received more than £20000 from bonds last year:  $IaNPBP > 20000$ ,  
INTERVIEWER: "Are you sure? ^Response at  $IaNPBP$  seems high - please  
check."

IF doesn't know or refuses to give amount from bonds last year:  $IaNPBP =$   
 $DK$ ) OR ( $IaNPBP = RF$

**$IaPBPB^*$**

Did ^you/you and your husband/wife/partner receive...

Brackets: (50, 100, 1000, 10000)

ENDIF

ENDIF

IF has National Savings Accounts or Certificates:  $IaSI = 6$

**$IaNS^*$**

How much do ^you/you and your husband/wife/partner have in your  
National Savings Accounts or Certificates?

Range: 0..9999997

CHECK: IF has more than £200000 in National Savings Accounts or  
Certificates:  $IaNS > 200000$ , INTERVIEWER: "Are you sure? ^Response  
at  $IaNS$  seems high - please check."

IF doesn't know or refuses to give amount in National Savings Accounts or  
Certificates:  $IaNS = DK$  OR  $IaNS = RF$

**$IaNSB^*$**

Do ^you/you and your husband/wife/partner have...

Brackets: (500, 2500, 10000, 100000)

ENDIF

**$IaNSi^*$**

About how much interest did ^you/you and your husband/wife/ partner  
receive from these accounts or certificates in the last year after tax?

Range: 0..99997

CHECK: IF received more than £10000 from these accounts or certificates  
in the last year:  $IaNSi > 10000$ , INTERVIEWER: "Are you sure? ^Response at  
 $IaNSi$  seems high - please check."

*IF doesn't know or refuses to give amount from these accounts or certificates in the last year: IaNSi = DK OR IaNSi = RF*

**IaNSIB\***

Did *^you/you and your husband/wife/ partner* receive...

Brackets: (10, 50, 150, 5000)

*ENDIF*

*ENDIF*

*IF holds PEP: IaSI = 7*

**IaIP\***

If you chose to sell your Personal Equity Plan(s) today, about how much would *^you/you and your husband/wife/partner* have after paying any fees?

Range: 0..999997

CHECK: IF would have more than £200000 from sale of Personal Equity Plan(s): *IaIP > 200000*, INTERVIEWER: "Are you sure? *^Response at IaIP* seems high - please check."

*IF doesn't know or refuses to give amount from sale of PEP(s): IaIP = DK OR IaIP = RF*

**Iaipb\***

Would *^you/you and your husband/wife/partner* have...

Brackets: (5000, 10000, 25000, 100000)

*ENDIF*

**IaIPi\***

Not including any income that was reinvested, about how much income did *^you/you and your husband/wife/partner* receive from these Personal Equity Plan(s) in the last year?

Range: 0..99997

CHECK: IF received more than £15000 from PEP(s) last year: *IaIPi > 15000*, INTERVIEWER: "Are you sure? *^Response at IaIPi* seems high - please check."

*IF doesn't know or refuses to give amount from PEP(s) last year: IaIPi = DK OR IaIPi = RF*

**IaIPib\***

Did *^you/you and your husband/wife/partner* receive...

Brackets: (200, 500, 1000, 7500)

*ENDIF*

*ENDIF*

*IF holds Stocks and/or Shares OR Share Options/Employer Share Ownership OR Share Clubs: IaSI = 8, 9 OR 10*

IF holds stocks and/or shares AND share options/employee share ownership AND share clubs: *IaSI = 8 AND 9 AND IaSI = 10, ^IaTxt5 =* stocks and shares, share options and share club shares.

ELSEIF holds stocks and/or shares AND share options/employee share ownership *IaSI = 8 AND 9, ^IaTxt5 =* stocks and shares and share

options.

ELSEIF holds stocks and/or shares AND share clubs: IaSI = 8 AND 10, ^IaTxt5 = stocks and shares and share club shares.

ELSEIF holds share options AND share clubs: IaSI = 9 AND 10, ^IaTxt5 = share options and share club shares.

ELSEIF holds stocks and/or shares: IaSI = 8, ^IaTxt5 = stocks and shares.

ELSEIF holds share options: IaSI = 9, ^IaTxt5 = share options.

ELSEIF holds share club shares: IaSI = 10, ^IaTxt5 = share club share`s.

**IaSSS\***

If you chose to sell your ^iaTxt5 today, about how much would ^you/you and your husband/wife/partner have?

Range: 0..9999997

CHECK: IF would have more than £200000 from sale of Stocks/Shares OR Share Options/Employer Share Ownership OR Share Clubs : IaSSS > 200000, INTERVIEWER: "Are you sure? ^Response at IaSSS seems high - please check."

*IF doesn't know or refuses to give amount from sale of Stocks/Shares OR Share Options/Employer Share Ownership OR Share Clubs: IaSSS = DK OR IaSSS = RF*

**IaSSSb\***

Would ^you/you and your husband/wife/partner have...

Brackets: (1000, 2500, 10000, 100000)

ENDIF

**IaSSSi\***

About how much dividend income did ^you/you and your husband/wife/partner receive from ^iatxt5 in the last year after tax?

Range: 0..999997

CHECK: IF received more than £30000 dividend income last year: IaSSSi > 30000, INTERVIEWER: "Are you sure? ^Response at IaSSSi seems high - please check."

*IF doesn't know or refuses to give amount of dividend income last year: IaSSSi = DK OR IaSSSi = RF*

**IaSSSib\***

Did ^you/you and your husband/wife/partner receive...

Brackets: (50, 150, 600, 15000)

ENDIF

**IaShTyp\***

Which of the following types of shares do ^you/you and your husband/wife/partner have...

READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

- 1 ...shares in privatised industries (for example, British Telecom, British Gas or RailTrack)?
- 2 ...shares in demutualised building societies or other mutual societies?
- 3 ...shares in other UK listed companies?
- 4 ...shares in foreign listed companies?

*IF has shares in privatised industries: IaShTyp = 1*

**IaDeNat\***

Did *^you/you and your husband/wife/partner* buy any of these shares in privatised industries at the time they were privatised?

- 1 Yes - all of them
- 2 Yes - some of them
- 3 No - none of them

ENDIF

*IF has shares in demutualised building societies: IaShTyp = 2*

**IaDeMut\***

Did *^you/you and your husband/wife/partner* buy or receive any of these shares in de-mutualised building societies at the time they de-mutualised?

- 1 Yes - all of them
- 2 Yes - some of them
- 3 No - none of them

ENDIF

ENDIF

*IF holds Unit or Investment Trust: IaSI = 11*

**IaUIT\***

If you chose to sell your Unit trusts or Investment trusts today, about how much would *^you/you and your husband/wife/partner* have?

Range: 0..9999997

CHECK: IF would have more than £400000 from sale of UIT: *IaUIT > 400000*, INTERVIEWER: "Are you sure? *^Response at IaUIT* seems high - please check."

*IF doesn't know or refuses to give amount from sale of UIT: IaUIT = DK OR IaUIT = RF*

**IaUITb\***

Would *^you/you and your husband/wife/partner* have...

Brackets: (5000, 10000, 50000, 200000)

ENDIF

**IaUITi\***

Not including any income that was re-invested, about how much income did *^you/you and your husband/wife/partner* receive from these Unit trusts or Investment trusts in the last year after tax?

Range: 0..999997

CHECK: IF received more than £20000 from the Unit trusts or Investment trusts in the last year *IaUITi > 20000*, INTERVIEWER: "Are you sure? *^Response at IaUITi* seems high - please check."

*IF doesn't know or refuses to give amount from Unit trusts or Investment trusts last year: IaUITi = DK OR IaUITi = RF*

**IaUITib\***

Did *^you/you and your husband/wife/partner* receive...

Brackets: (150, 500, 12500, 10000)

| *ENDIF*

| *ENDIF*

| *IF has Bonds and Gilts: IaSI = 12*

| **Iabg\***

| If you chose to sell your bonds and gilts today, about how much would  
| ^you/you and your husband/wife/partner have?

| Range: 0..9999997

| CHECK: IF would have more than £200000 from sale of bonds and gilts  
| today: Iabg > 200000, INTERVIEWER: "Are you sure? ^Response at Iabg seems  
| high - please check."

| *IF doesn't know or refuses to give amount from sale of bonds and gilts  
| today: Iabg = DK OR Iabg = RF*

| | **Iabgb\***

| | Would ^you/you and your husband/wife/partner have...

| | Brackets: (10000, 20000, 40000, 100000)

| | *ENDIF*

| | **Iabgi\***

| | About how much income did ^you/you and your husband/wife/partner receive  
| | from these Bonds and Gilts in the last year after tax?

| | Range: 0..999997

| | CHECK: IF received more than £100000 from bonds and gilts last year:  
| | Iabgi > 100000, INTERVIEWER: "Are you sure? ^Response at Iabgi seems high  
| | - please check."

| | *IF doesn't know or refuses to give amount received from bonds and gilts  
| | last year: Iabgi = DK OR Iabgi = RF*

| | | **Iabgib\***

| | | Did ^you/you and your husband/wife/partner receive...

| | | Brackets: (100, 300, 1000, 50000)

| | | *ENDIF*

| *ENDIF*

| *IF has other savings or investments: IaSI = 95*

| | **IaSIo\***

| | How much in total do ^you/you and your husband/wife/partner have in  
| | other savings or investments?

| | Range: 0..9999997

| | CHECK: IF has more than £200000 in other savings and investments: IaSIo >  
| | 200000, INTERVIEWER: "Are you sure? ^Response at IaSIo seems high -  
| | please check."

| | *IF doesn't know or refuses to give amount in other savings and  
| | investments: IaSIo = DK OR IaSIo = RF*

| | | **IaSiob\***

| | | Do ^you/you and your husband/wife/partner have...

| | | Brackets: (1000, 5000, 20000, 100000)

```
|
| ENDIF
|
| IaSiOi*
| About how much interest did ^you/you and your husband/wife/partner
| receive from these other savings or investments in the last year after
| tax?
| Range: 0..999997
|
| CHECK: IF received more than £20000 from other savings and investments
| last year: IaSiOi > 20000, INTERVIEWER: Are you sure? ^Response at IaSiOi
| seems high - please check.
|
| IF doesn't know or refuses to give amount from other savings and
| investments last year: IaSiOi = DK OR IaSiOi = RF
|
| IaSiOib*
| Did ^you/you and your husband/wife/partner receive...
| Brackets: (50, 150, 500, 10000)
|
| ENDIF
```

ENDIF

IF has some savings or investments: IaSI = RESPONSE AND IaSI <> 96

```
| IASick*
| INTERVIEWER: PLEASE CHECK FINANCIAL ASSETS SUMMARY BELOW:
| 'DISPLAY SUMMARY TABLE OF ALL FINANCIAL ASSETS'
| GO BACK AND CHANGE ANY THAT ARE INCORRECT
| Press 1 and Enter to continue
```

ENDIF

IF share type is NOT shares in privatised industries: IaShTyp <> 1

```
| IaDen*
| Did ^you/you or your husband/wife/partner ever buy any shares when the
| nationalised industries (for example, British Telecom, British Gas or
| RailTrack) were privatised?
| 1 Yes
| 2 No
```

ENDIF

IF share type is NOT shares in demutualised building societies or other mutual societies: IaShTyp <> 2

```
| IaDem*
| Did ^you/you or your husband/wife/partner ever receive any windfall
| shares as a result of a demutualisation of a building society or other
| mutual institution?
| 1 Yes
| 2 No
```

ENDIF

```
| IaLi*
| Do ^you/you or your husband/wife/partner have any life insurance policies?
| 1 Yes
| 2 No
```

*IF has life insurance policies: IaLi = 1*

*IF answering as part of couple: IAask = 1*

**IaLiW\***

Which of you has life insurance policies?

- 1 Respondent only
- 2 Spouse / partner only
- 3 Both

*ENDIF*

*IF respondent only or both respondent and partner/spouse have life insurance policies or if was not asked IaLiW: IaLiW = 1 OR 3 OR IaLiW = EMPTY*

**IaLiYA\***

How much would your dependants get from your life insurance policy or policies if you died?

Range: 0..9999997

CHECK: IF would get more than £800000 from life insurance policies:  
IaLiYA > 800000, INTERVIEWER: "Are you sure? ^Response at IaLiYA seems high - please check."

*IF doesn't know or refuses to give amount from life insurance policies:  
IaLiYA = DK OR IaLiYA = RF*

**Ialiyab\***

Would they get...

Brackets: (20000, 50000, 100000, 400000)

*ENDIF*

*ENDIF*

*IF only spouse/partner or both respondent and partner/spouse have life insurance policies: IaLiW = 2 OR 3*

**IaLipA\***

How much would ^husband/wife/partner's dependants get from (his/her) life insurance policy or policies if (he/she) died?

Range: 0..9999997

CHECK: IF would get more than £800000 from life insurance policies:  
IaLipA > 800000, INTERVIEWER: "Are you sure? ^Response at IaLipA seems high - please check."

*IF doesn't know or refuses to give amount from life insurance policies:  
IaLipA = DK OR IaLipA = RF*

**Ialipab\***

Would they get...

Brackets: (20000, 50000, 100000, 400000)

*ENDIF*

*ENDIF*

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IF both respondent and their partner/spouse have life insurance policies:  
IaLiW = 3, ^litxt = your and husband/wife/partner`s.  
ELSEIF only respondent`s spouse/partner has a life insurance policy:  
IaLiW = 2, ^litxt = husband/wife/partner`s.  
ELSE, ^litxt = your.

**IaSC\***

Do any of ^litxt life insurance policy or policies have a savings component?  
THAT IS THE VALUE OF THE FUND WILL BE PAID AT SOME POINT IN THE FUTURE  
1 Yes  
2 No

IF life insurance policy has a savings component: IaSC = 1

**IaSCA\***

About how much in total will (this/these) savings component(s) yield when (it/they) mature(s)?  
Range: 0..9999997

CHECK: IF it will yield more than £500000: IaSCA > 500000, INTERVIEWER:  
"Are you sure? ^Response at IaSCA seems high - please check."

IF doesn't know or refuses to give amount of savings component: IaSCA =  
DK OR IaSCA = RF

**IaSCAb\***

Will (this/these) yield...  
Brackets: (10000, 25000, 50000, 250000)

ENDIF

ENDIF

ENDIF

IF has some savings or investments: IaSI = RESPONSE AND IaSI <> 96

**IADoc\***

INTERVIEWER: CODE WHETHER RESPONDENT CONSULTED DOCUMENTS WHEN ANSWERING THE FINANCIAL ASSETS QUESTIONS  
1 Respondent consulted documents frequently  
2 Respondent consulted documents occasionally  
3 Respondent did not consult documents

**IAIntA\***

INTERVIEWER: HOW ACCURATE DO YOU THINK THE ANSWERS GIVEN BY THE RESPONDENT WERE?  
1 Very accurate  
2 Fairly accurate  
3 Not very accurate  
4 Not at all accurate

ENDIF

NEW BLOCK - IAD

Time at start of real assets section (set by Iaprop)  
TIME

**Iaprop\***

SHOW CARD CC

Which, if any, of these assets do *^you/you or your husband/wife/partner* have?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Houses, flats or holiday homes, including timeshares (not including this home)
- 2 Farm or Business Property (such as a shop, warehouse or garage)
- 3 Other land
- 4 Money owed to you by others
- 5 A trust
- 6 A covenant or inheritance
- 95 Other assets (including works of art or collectibles such as antiques or jewellery)
- 96 None of these [Exclusive code]

*IF has houses, flats or holiday homes: Iaprop = 1*

**IaHome\***

If you chose to sell your house or holiday home and then paid off any debts on it, about how much would *^you/you and your husband/wife/partner* get?

Range: 0..999997

CHECK: IF would get more than £500000 from sale of house or holiday home: *IaHome > 500000*, INTERVIEWER: "Are you sure? *^Response at IaHome* seems high - please check."

*IF doesn't know or refuses to give amount from sale of house or holiday home: IaHome = DK OR IaHome = RF*

**IaHomeb\***

Would *^you/you and your husband/wife/partner* get...

Brackets: (10000, 50000, 100000, 250000)

ENDIF

**Iair\***

Did *^you/you and your husband/wife/partner* receive any income or rent from that property in the last year?

- 1 Yes
- 2 No

*IF received income or rent from property in the last year: Iair = 1*

**Iaira\***

How much income or rent did *^you/you and your husband/wife/partner* receive from that property in the last year, after any expenses and taxes?

Range: 0..999997

CHECK: IF received more than £100000 from the property last year: *Iaira > 100000*, INTERVIEWER: "Are you sure? *^Response at Iaira* seems high - please check."

*IF doesn't know or refuses to give amount from property last year: Iaira = DK OR Iaira = RF*

**IaIRB\***

Did *^you/you and your husband/wife/partner* receive...

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```
| | | Brackets: (1500, 4000, 7500, 50000)
| | |
| | | ENDIF
| | |
| | | ENDIF
| | |
| | | ENDIF

IF has Farm or Business property: Iaprop = 2

| | | Iafbpb*
| | | If you sold your Farm or Business property and then paid off any debts on
| | | it, about how much would ^you/you and your husband/wife/partner get?
| | | Range: 0..9999997

| | | CHECK: IF would receive more than £1000000 from sale of farm or business
| | | property: Iafbpb > 1000000, INTERVIEWER: "Are you sure? ^Response at
| | | Iafbpb seems high - please check."

| | | IF doesn't know or refuses to give amount would receive from sale of farm
| | | or business property: Iafbpb = DK OR Iafbpb = RF

| | | Iafbpb*
| | | Would ^you/you and your husband/wife/partner get...
| | | Brackets: (10000, 50000, 100000, 500000)
| | |
| | | ENDIF

| | | Iafbpr*
| | | Did ^you/you and your husband/wife/partner receive any income or rent
| | | from that property in the last year?
| | | 1 Yes
| | | 2 No

| | | IF received income or rent from property in the last year: Iafbpr = 1

| | | IafBA*
| | | How much income or rent did ^you/you and your husband/wife/partner
| | | receive from that property in the last year, after any expenses and
| | | taxes?
| | | Range: 0..999997

| | | CHECK: IF received more than £100000 income or rent from farm or
| | | business property: IafBA > 100000, INTERVIEWER: "Are you sure?
| | | ^Response at IafBA seems high - please check."

| | | IF doesn't know or refuses to give amount of income or rent from farm
| | | or business property: IafBA = DK OR IafBA = RF

| | | Iafbpb*
| | | Did ^you/you and your husband/wife/partner receive...
| | | Brackets: (1500, 4000, 7500, 50000)
| | |
| | | ENDIF

| | | ENDIF

| | | ENDIF

IF has other land or money owed by others or trust or covenant or
inheritance or other assets: Iaprop = 3, 4, 5, 6 OR 95
```

Repeat IaOasA to IaOasAb for each asset mentioned at Iaprop

**IaOasA\***

How much is ^asset worth?

Range: 0..9999997

CHECK: IF asset is worth more than £200000: IaOasA > 200000, INTERVIEWER:  
"Are you sure? ^Response at IaOasA seems high - please check."

*IF doesn't know or refuses to give amount of ^asset: IaOasA = DK OR  
IaOasA = RF*

**IaOasAb\***

Is it worth...

Brackets: (5000, 7500, 20000, 100000)

ENDIF

ENDIF

NEW BLOCK - IAE

Time at start at start of other income and debts section (set by Iaregp)  
TIME

**Iaregp\***

Apart from anything you have already told me about, did you receive any  
regular payments from people not living here in the past year (that is  
since ^date one year ago)?

- 1 Yes
- 2 No

*IF received regular payments from people not living in the household in  
past year: Iaregp = 1*

Iapay to IaOthP should be repeated for up to 4 payments.

**Iapay\***

Thinking about your ^First/second/third/next payment who was it from?

- 1 Husband/Wife
- 2 Ex-husband/wife/partner
- 3 Son/Daughter
- 4 Son/daughter-in-law
- 5 Parent
- 6 Parent-in-law
- 7 Brother/Sister
- 8 Brother/sister-in-law
- 9 Grandchild
- 10 Other relative
- 11 Other non-relative
- 12 Local Authority
- 13 Publisher

**Iapayr\***

What was the reason for this payment?

CODE ONE ONLY

- 1 Financial support for children
- 2 Household bills/expenses
- 3 Spending money/allowance
- 4 Loan repayment

- 5 Maintenance or alimony
- 6 Royalties
- 95 Other (specify)

*IF other reason for payment: Iapayr = 95*

**Iapayo\***

ENTER OTHER REASON

STRING: up to 60 Characters

*ENDIF*

**Iarego\***

What period did your usual payments cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]

*IF valid response regarding period or payment: Iarego = RESPONSE*

**Iaregm\***

And about how much did you usually receive?

Range: 0..9999997

CHECK: IF received more than £4000 per week OR more than £8000 every two weeks OR more than 16000 per month OR more than £200000 per year: (Iaregm = RESPONSE AND Iaregm <> 999997) AND (Iarego = 1 AND Iaregm > 4000) OR (Iarego = 2 AND Iaregm > 8000) OR (Iarego = 4, 5 AND Iaregm > 16000) OR (Iarego = 3, 7.. 26, 52, 90, 95 AND Iaregm > 200000), INTERVIEWER: "Are you sure? ^Response at Iaregm seems high - please check."

*ENDIF*

*IF doesn't know OR refuses to give amount or frequency of payments: (Iarego = DK OR Iarego = RF) OR (Iaregm = DK OR Iaregm = RF)*

*IF receives payment one a week: Iarego = 1*

**Iaregmwb\***

Did you usually receive...

Brackets: (25, 50, 100, 2000)

*ELSEIF receives payment every two weeks: Iarego = 2*

**Iaregmfb\***

Did you usually receive...

Brackets: (50, 100, 200, 4000)

*ELSEIF receives payment every four weeks or one month: Iarego = 4 OR 5*

**Iaregmmb\***

Did you usually receive...

Brackets: (100, 200, 400, 8000)

*ELSEIF receives payment once a year or in a lump sum: Iarego = 52 OR 95*

**Iaregmyb\***

Did you usually receive...

Brackets: (1250, 2500, 5000, 100000)

*ELSE*

**Iaregmob\***

Did you usually receive in a month...

Brackets: (100, 200, 400, 8000)

*ENDIF*

*ENDIF*

**IaOthP\***

Did you receive any other regular payments from people not living here in the past year?

- 1 Yes
- 2 No

*ENDIF*

*IF answering as part of a couple: IAAsk = 1*

**Iapar\***

Apart from anything you have already told me about, did ^husband/wife/partner receive any regular payments from people not living here in the past year (that is since ^date one year ago)?

- 1 Yes
- 2 No

*IF ^husband/wife/partner received other regular payments from people not living here in the past year: Iapar = 1*

REPEAT QUESTIONS IaPS TO IaMrP for up to 4 PAYMENTS

**IaPS\***

Thinking about ^husband/wife/partner's ^First/second/third/next payment who was it from?

- 1 Husband/Wife
- 2 Ex-husband/wife/partner
- 3 Son/Daughter
- 4 Son/daughter-in-law
- 5 Parent
- 6 Parent-in-law
- 7 Brother/Sister
- 8 Brother/sister-in-law
- 9 Grandchild
- 10 Other relative
- 11 Other non-relative
- 12 Local Authority
- 13 Publisher

**IaPR\***

What was the reason for this payment?

CODE ONE ONLY

- 1 Financial support for children
- 2 Household bills/expenses
- 3 Spending money/allowance
- 4 Loan repayment
- 5 Maintenance or alimony
- 6 Royalties
- 95 Other (specify)

*IF other reason for the payment: IaPR = 95*

**Iaparo\***

ENTER OTHER REASON

Text: up to 60 characters

*ENDIF*

**Iapf\***

What period did ^husband/wife/partner's usual payments cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]

*IF valid response at Iapf: Iapf = RESPONSE*

**Iapam\***

And about how much did ^husband/wife/partner usually receive?

Range: 0..999997

*ENDIF*

*IF doesn't know or refuses to give amount or frequency of payment:*

*(Iapf = DK OR Iapf = RF) OR (Iapam = DK OR Iapam = RF)*

*IF receives payment once a week: Iapf = 1*

**Iapwb\***

Did ^husband/wife/partner usually receive...

Brackets: (25, 50, 100, 2000)

*ELSEIF receives payment every two weeks: Iapf = 2*

**Iapfb\***

Did ^husband/wife/partner usually receive...

Brackets: (50, 100, 200, 4000)

*ELSEIF receives payment every four weeks or one month: Iapf = 4 or 5*

```

|
|
|   Iapmb*
|   Did ^husband/wife/partner usually receive...
|   Brackets: (100, 200, 400,8000)
|
|   ELSEIF receives payment once a year or in a lump sum: Iapf = 52 or 95
|
|   Iapyb*
|   Did ^husband/wife/partner usually receive...
|   Brackets: (1250, 2500, 5000, 100000)
|
|   ELSE
|
|   Iapob*
|   Did ^husband/wife/partner usually receive in a month...
|   Brackets: (100, 200, 400, 8000)
|
|   ENDIF
|
|   ENDIF
|
|   IaMrP*
|   Did ^husband/wife/partner receive any other regular payments from
|   people not living here in the past year?
|   1   Yes
|   2   No
|
|   ENDIF
|
|
|   Iapk
|   SHOW CARD DD
|   Which, if any, of these payments and payments in kind have ^you/you or your
|   husband/wife/partner received in the last year (that is since ^date a year
|   ago)?
|   PROBE: What others?
|   CODE ALL THAT APPLY
|   1   Life insurance policy
|   2   Lump sum pension pay-out
|   3   Personal Accident plan
|   4   Other Insurance Payment
|   5   Redundancy payment
|   6   Inheritance or bequest (inc. inherited property)
|   7   Win(s) on the football pools, national lottery or other form of
|       gambling
|   95  Other payment (SPECIFY)
|   96  None of these [Exclusive code]
|
|   IF received other payments in kind: Iapk = 95
|
|   Iapko
|   INTERVIEWER: WRITE IN SOURCE OF OTHER PAYMENT
|   Text: up to 20
|
|   ENDIF
|
|   IF received other payments in kind: Iapk = RESPONSE AND Iapk <> 96
|
|   REPEAT Iapkm FOR EACH OF THE PAYMENTS MENTIONED AT Iapk
|
|   Iapkm*
|   How much in total was ^payment?

```

Range:0..999997

IF does not know or refuses to give amount of payment: Iapkm = DK OR  
Iapkm = RF

**IaPkmb\***

Did ^you/you or your husband/wife/partner receive...

Brackets: (2500, 5000, 15000, 50000)

ENDIF

ENDIF

**Iadebt\***

I would like to ask you about any other financial commitments ^you/you or your husband/wife/partner may have apart from mortgages or housing related loans.

Do ^you/you or your husband/wife/partner currently owe any money on credit or store cards?

1 Yes

2 No

IF currently owes money on credit or store cards: Iadebt = 1

**Iadebm\***

How much was the outstanding balance on these cards after the last monthly payment was made?

Range: 0..99997

CHECK: IF owes more than £50000 on credit or store cards: Iadebm > 50000,  
INTERVIEWER: "Are you sure? ^Response at Iadebm seems high - please check."

IF does not know or refuses to give amount that owes: Iadebm = DK OR  
Iadebm = RF

**Iadebmb\***

Was it ...

Brackets: (1000, 2000, 5000, 25000)

ENDIF

ENDIF

**Iaowe\***

Do ^you/you or your husband/wife/partner currently owe any money to friends, relatives, or other private individuals?

1 Yes

2 No

IF owes money to friends, relatives, or other individuals: Iaowe = 1

**Iaowem\***

How much do ^you/you and your husband/wife/partner owe?

Range: 0..99997

CHECK: IF owes more than £50000 to friends, relatives or others: Iaowem > 50000,  
INTERVIEWER: "Are you sure? ^Response at Iaowem seems high - please check."

IF does not know or refuses to give amount owes to friends, relatives or others: Iaowem = DK OR Iaowem = RF

**Iaowetb\***

Do ^you/you and your husband/wife/partner owe...

Brackets: (1000, 2000, 5000, 25000)

ENDIF

**IaRegR\***

Do ^you/you and your husband/wife/partner make regular repayments on these loans?

1 Yes

2 No

IF makes regular payments on the loans: IaRegR = 1

**IaRegRP\***

What period do these repayments cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]

IF valid response: IaRegRP = RESPONSE

**Iarep\***

How much are your usual repayments?

Range: 0..9997

CHECK: IF repayments are more than £300 per week OR more than £600 per fortnight OR more than £1200 per month OR more than £15000 per year: Iarep = RESPONSE AND (IaRegRP = 1 AND Iarep > 300) OR (IaRegRP = 2 AND Iarep > 600) OR (IaRegRP = 4, 5 AND (Iarep > 1200) OR (IaRegRP = 3, 7..26, 52, 90, 95 AND Iarep > 15000)), INTERVIEWER: "Are you sure? ^Response at Iarep seems high - please check.

ENDIF

IF does not know or refuses to give amount or frequency of repayments: (IaRegRP = DK OR IaRegRP = RF) OR (Iarep = DK OR Iarep = RF)

IF repayments are once a week: IaRegRP = 1

**IaRPWb\***

Are they...

Brackets: (10, 20, 50, 150)

ELSEIF repayments are every two weeks: IaRegRP = 2



IF does not know or refuses to give amount owed on loans: Ialoam = DK OR Ialoam = RF

**Ialoamb**

Do ^you/you and your husband/wife/partner owe...

Brackets: (1000, 2000, 5000, 25000)

ENDIF

IF loan type is hire purchase agreement OR IF have any loan other than overdraft: Ialoan = 1 OR Ialoan <> 3

**IalreP**

What period do ^your and your husband's/wife's/partner's usual repayments on these loans cover?

IF DOESN'T MAKE REPAYMENTS, CODE 97

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these [EXPLAIN IN A NOTE]
- 97 Doesn't make repayments

IF valid response regarding period of loan repayment: IalreP = RESPONSE AND IalreP <> 97

**Ialre\***

How much are your usual repayments on these loans?

Range: 0..99997

CHECK: IF repayments are more than £300 per week OR more than £600 every two weeks, more than £1200 per month or more than £15000 per year: Ialre = RESPONSE AND (IalreP = 1 AND Ialre > 300) OR (IalreP = 2 AND Ialre > 600) OR (IalreP = 4, AND Ialre > 1200) OR (IalreP = 3, 7..26, 52, 90..92 AND (Ialre > 15000), INTERVIEWER: "Are you sure? ^Response at Ialre seems high - please check."

ENDIF

IF doesn't know or refuses to give amount or frequency of repayments: (IalreP = DK OR IalreP = RF) OR (Ialre = DK OR Ialre = RF)

IF repayments are once a week: IalreP = 1

**Ialrpwb\***

Are your usual repayments on these loans...

Brackets: (10, 20, 50, 150)

ELSEIF repayments are every two weeks: IalreP = 2

**Ialrpfb\***

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```
| | | Are your usual repayments on these loans...
| | | Brackets (20, 40, 100, 300)
| | | ELSEIF repayments are every four weeks or one month: IalreP = 4 Or
| | | IalreP = 5
| | | Ialrpmb*
| | | Are your usual repayments on these loans...
| | | Brackets: (40, 80, 200, 600)
| | | ELSEIF repayments are once a year or in a lump sum: IalreP = 52 Or
| | | IalreP = 95
| | | Ialrpyb*
| | | Are your usual repayments on these loans...
| | | Brackets: (500, 1000, 2500, 7500)
| | | ELSE
| | | Ialrpob*
| | | Are your usual repayments on these loans per month...
| | | Brackets: (40, 80, 200, 600)
| | | ENDIF
| | | ENDIF
| | | ENDIF
| | | ENDIF
```

NEW BLOCK

*IF person is part of couple and each member of couple is answering IA separately: Icouplen > 0 AND ICAskIA = Yes*

**IaJnt\***

Can I just check, do you have any savings, investments, property or other assets that are held jointly with ^your husband/wife/partner?

- 1 Yes
- 2 No

*If has assets that are held jointly: IaJnt = 1*

**IaAm\***

About how much would your personal share amount to, minus your share of any joint debts ^you and your husband/wife/partner might have?  
Range: 0..999997

CHECK: IF has more than £100000 in savings, investments, property or other assets: IaAm > 100000, INTERVIEWER: "Are you sure? ^Response at IaAm seems high - please check."

*IF doesn't know or refuses to give amount of savings, investments, property or other assets: IaAm = DK OR IaAm = RF*

**IaAmB\***

Would it amount to...  
Brackets: (1000, 2500, 10000, 50000)

ENDIF

| |  
| *ENDIF*  
|

*ENDIF*

*IF more than one person in HH are eligible to answer IA, then only one should answer IaFcon to IaFinw (first one to answer IA)*

**Iafcon\***

SHOW CARD FF

Which of the phrases on the card best describes how ^you/you and your husband/wife/partner are getting along financially these days?

- 1 manage very well
- 2 manage quite well
- 3 get by alright
- 4 don't manage very well
- 5 have some financial difficulties
- 6 have severe financial difficulties

*IF person is married or cohabitating: Icouple = married OR Icouple = cohabit*

| **Iaorgf**

| SHOW CARD GG

| People organise their family finances in different ways.

| Which of the methods on this card comes closest to the way you organise yours.

| It doesn't have to fit exactly - just choose the nearest one.

| You can just tell me the number which applies.

| CODE ONE ONLY

- | 1 I look after all the household money except my partner's personal spending money
- | 2 My partner looks after all the household money except my personal spending money
- | 3 I am given a housekeeping allowance. My partner looks after the rest of the money
- | 4 My partner is given a housekeeping allowance. I look after the rest of the money
- | 5 We share and manage our household finances jointly
- | 6 We keep our finances completely separate"
- | 7 Some other arrangement

| *IF uses some other arrangement: Iaorgf = 7*

| **Iaorgd**

| PLEASE RECORD DETAILS

| Text: up to 60

| *ENDIF*

| **Iafind**

| In your household who has the final say in big financial decisions?

| DO NOT PROMPT

| CODE ONE ONLY

- | 1 Respondent
- | 2 Partner
- | 3 Both have equal say
- | 4 Other

| *IF other people have a say in big financial decisions: Iafind = 4*

|

```

| | Iafinw
| | WRITE IN
| | Text: up to 20
| |
| | ENDIF
|
ENDIF

```

NEW BLOCK

*IF more than one person in HH are eligible to answer IA, then only one should answer IaPayW to IaOmmmb (first one to answer IA)*

**AskRec**

Derived - Ask IAREC?

- 1 Yes
- 2 No

*IF there are any household members aged 16 or over who are not eligible for interview, AskRec = 1*

*IF there are any household members aged 16 or over who are not eligible for interview*

```

| REPEAT IaPayw to Iaommb for all people in household aged 16 or over who
| are not eligible for interview.

```

**Iapayw\***

During the last year did ^name do any work for pay?

- 1 Yes
- 2 No

*IF did work for pay last year : Iapayw = 1*

**Iaearn\***

About how much money did ^name earn from all jobs in the last year, before any tax or other deductions?

Range: 0..999997

CHECK: IF earned more than £200000 in the last year: Iaearn > 200000,  
INTERVIEWER: Are you sure? ^Response at Iaearn seems high - please check.

*IF doesn't know or refuses to give amount of earnings last year: Iaearn = DK OR Iaearn = RF*

**Iaearnb\***

Did ^name earn...

Brackets: (10000, 20000, 35000, 100000)

*ENDIF*

*ENDIF*

*ENDIF*

*IF there are any household members aged 16 or over who are not eligible for interview: AskRec = 1*

**Iarec\***

Not including any job income, about how much in total did ^name receive in the last year from benefits, pensions, interest, gifts or anything

else (before any taxes or deductions)?  
Range: 0..999997

CHECK: IF received more than £100000 from benefits, pensions, interest or gifts in the last year: Iarec = RESPONSE AND Iarec > 100000, INTERVIEWER: "Are you sure? ^Response at Iarec seems high - please check."

IF doesn't know or refuses to give amount received: Iarec = DK OR Iarec = RF

**Iarecb\***

Did ^name receive  
Brackets: (250, 500, 1000, 5000)

ENDIF

**Iaom\***

Does ^name have more than £2,500 total in bank accounts, other financial assets, vehicles, property, or other investments?

- 1 Yes
- 2 No

IF has more than £2,500 total in bank accounts, other financial assets, vehicles, property, or other investments: Iaom = 1

**Iaomm\***

About how much altogether would that amount to, minus any debts he/she/they might have?  
Range: 0..999997

CHECK: IF assets would amount to more than £300000: Iaomm > 300000, INTERVIEWER: "Are you sure? ^Response at Iaomm seems high - please check."

ENDIF

IF doesn't know or refuses to give amount of assets: Iaomm = DK OR Iaomm = RF

**Iaommb\***

Brackets: (1000, 5000, 20000, 150000)

ENDIF

ENDIF

**Housing Module**

Time at start of general housing section (set by HoWho and HoWhn)  
TIME

**HoAsk**

Total of previous householders still in household.  
Range: 0..97

**HoEli**

Computed: Yes if at least one person named at HoWhN is eligible for  
interview (elign=yes)

- 1 Yes
- 2 No

IF more than one person in Household: HHTot > 1, ^hous1 = household`s

IF everyone named as householder at HSE is still resident in the household:  
HSE.HHldr = RESPONSE AND HoAsk = CARDINAL(HSE.HHldr

```
|
| HoWho*
| I'd like to check some general information about your ^hous1
| accommodation. Is your accommodation still owned or rented in
| ^householder(s)'s name at HSE interview?
| 1 Yes
| 2 No
|
```

ENDIF

IF everyone named as householder at HSE is still resident in the  
household: HSE.HHldr = RESPONSE AND HoAsk = CARDINAL(HSE.HHldr)  
^introtxt = I'd like to get some general information about your  
household`s accommodation.

IF HoWho was not asked or accommodation is not still owned or rented: HoWho  
= EMPTY OR HoWho = 2

```
|
| HoWhN
| ^introtxt In whose name is the accommodation owned or rented?
| CODE ALL THAT APPLY
| (Display's person number's and names of everyone in HH,
| 97 = not a household member.
|
| CHECK: IF gave response at HoWhN and householder does not appear in
| household grid: HoWhN = RESPONSE AND k IN HoWhN AND (DMName <>
| EMPTY) - INTERVIEWER: "^Person number is not a valid person number.
| Please change!"
|
```

ENDIF

IF current householder is the same as at HSE interview: HoWho = 1, HoWhN =  
Hse.HHldr  
ELSEIF doesn't know whether householder is the same as at HSE interview:  
HoWho = DK, HoWhN= DK  
ELSEIF refused whether householder is the same as at HSE interview: HoWho =  
RF, HoWhN= RF

For each person in the household that is not the householder AND not  
married to the householder: IF (QHD.DMPres = Yes AND NOT k IN HoWhN) AND  
NOT QHD.couplen IN HoWhN

|

Repeat questions HoBas to HoBPo

**HoBas\***

On what basis are you living here? Do you ...READ OUT...

CODE ONE ONLY

- 1 ... pay regular rent
- 2 pay something from time to time
- 3 or, live here rent free

*IF pays regular rent: HoBas = 1*

**HoBP\***

Thinking about your last rent payment, what period did it cover?

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF valid response about rent payment period: HoBP = RESPONSE*

**HoBA\***

How much was your last rent payment?

ENTER AMOUNT

Range:0..99997

CHECK: IF amount is greater than £300 per week OR £600 for two weeks OR £1200 per month OR £15000 per year: (HoBP = 1 AND HoBA > 300) OR (HoBP = 2 AND HoBA > 600) OR HoBP = 4, 5 AND HoBA > 1200) OR (HoBP = 52 AND HoBA > 15000), INTERVIEWER: Are you sure? ^Response at HoBA seems high - please check.

*ENDIF*

*IF doesn't know or refused to give income or period: (HoBP = DK OR HoBP = RF) OR (HoBA = DK OR HoBA = RF)*

*IF pays rent per week: HoBP = 1*

**HoBPW\***

Was it

Brackets:(20, 40, 60, 150)

*ELSEIF pays rent per two weeks: HoBP = 2*

**HoBPf\***

Was it

Brackets:(40, 80, 120, 300)

*ELSEIF pays rent for four weeks or one month: HoBP = 4 or 5*



squatting?"

ELSEIF only one person in household: HHtot>1 **AND**

IF tenure at HSE was owned outright: Hse.Tenureb = Outright, ^tenuntxt = "Do you still own it outright?"

ELSEIF tenure at HSE was buying with the help of mortgage or loan: Hse.Tenureb = Buying, ^tenuntxt = "Are you still buying it with the help of a mortgage or loan?"

ELSEIF tenure at HSE was shared ownership: Hse.Tenureb = Part, ^tenuntxt = "Are you still paying part rent and part mortgage (shared ownership)?"

ELSEIF tenure at HSE was rented: Hse.Tenureb = RENT, ^tenuntxt = "Are you still renting it?"

ELSEIF tenure at HSE was living rent free: Hse.Tenureb = Free, ^tenuntxt = "Are you still living here rent free?"

ELSEIF tenure at HSE was squatting: Hse.Tenureb = Squatting, ^tenuntxt = "Are you household still squatting?"

ELSE (more than one person in household) **AND**

IF tenure at HSE is owned outright: Hse.Tenureb = Outright, ^tenuntxt = "Does your household still own it outright?"

ELSEIF tenure at HSE buying with help of mortgage or loan: Hse.Tenureb = Buying, ^tenuntxt = "Is your household still buying it with the help of a mortgage or loan?"

ELSEIF tenure at HSE is shared ownership: Hse.Tenureb = Part, ^tenuntxt = "Is your household still paying part rent and part mortgage (shared ownership)?"

ELSEIF tenure at HSE is rented: Hse.Tenureb = RENT, ^tenuntxt = "Is your household still renting it?"

ELSEIF tenure at HSE was living rent free: Hse.Tenureb = Free, ^tenuntxt = "Is your household still living here rent free?"

ELSEIF tenure at HSE was squatting: Hse.Tenureb = Squatting, ^tenuntxt = "Is your household still squatting?"

*IF address is the same as in ARF label and tenure information available from HSE: QHD.DHSameH = Yes AND Hse.Tenureb = RESPONSE*

**HoTenuN**

I'd like to check how *^this accommodation is owned or rented/name(s) of householder(s) occupy this accommodation/you occupy this accommodation/your household occupies this accommodation.*

^tenuntxt

- 1 Yes
- 2 No

ENDIF

*IF response is not yes: HoTenuN <> Yes*

**HoTenu**

SHOW CARD HH

In which of these ways ^tenuntxt?

INCLUDE 'OWN IT WITH EQUITY RELEASE' IN CODE 1

- 1 Own it outright
- 2 Buying it with the help of a mortgage or loan
- 3 Pay part rent and part mortgage (shared ownership)
- 4 Rent it
- 5 Live here rent free (including rent free in relative's/friend's property, excluding squatting)
- 6 Squatting

|  
ENDIF

IF answered yes to HoTenuN or tenure still the same as in HSE, then HoTenu is set the same as in HSE

IF sharing ownership or renting it and there is at least one householder available for interview: (HoTenu = 3 OR 4) AND HoEli = 1

|  
**HoJob**

| Does the accommodation go with the job of someone in the household?

- | 1 Yes  
| 2 No

|  
**HoLand\***

| SHOW CARD II

| Who is your landlord?

| INCLUDE NEW TOWN DEVELOPMENT IN Code 1

- | 1 Local authority or council  
| 2 Housing association or co-operative or charitable trust  
| 3 Individual private landlord  
| 4 Employer of a household member  
| 5 Relative/friend of a household member  
| 95 Another organisation / individual

|  
**HoFurn\***

| Is your accommodation provided ... READ OUT ...

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

|  
ENDIF

**HoMove\***

In what year did you move to this accommodation?

IF BORN THERE, CODE YEAR OF BIRTH

IF ASKED: CODE EARLIEST YEAR A MEMBER OF HOUSEHOLD MOVED TO ACCOMMODATION

Range: 1900..2050

CHECK: IF moved to this accommodation later than 2002: (HoMove = RESPONSE AND Qinit.FWYear = RESPONSE) (HoMove > qinit.fwyear), - INTERVIEWER: "This is later than ^Qinit.fwyear! Please check!"

CHECK: IF moved to this accommodation in year later than interview date: Qinit.Intdat = RESPONSE AND YEAR (Qinit.Intdat) < HoMove - INTERVIEWER: "This year is in the future! Please change!"

CHECK: IF moved to this accommodation in year earlier than date of birth: Idob = RESPONSE AND YEAR (Idob) > HoMove - INTERVIEWER: "This is before ^respondent's name was born! Please check!"

**HoRoom\***

How many rooms ^do you/does your household occupy here, including bedrooms but not counting bathrooms, kitchens and any rooms you let or sublet?

Range: 1..30

**HoAdpt\***

SHOW CARD JJ

Some homes have special features to assist people who have physical impairments or health problems. Whether you use them or not, does your home have any of the features on this card?

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PROBE: What others?

CODE ALL THAT APPLY

- 1 Widened doorways or hallways
- 2 Ramps or street level entrances
- 3 Hand rails
- 4 Automatic or easy open doors
- 5 Accessible parking or drop off site
- 6 Bathroom modifications
- 7 Kitchen modifications
- 8 Lift
- 9 Chair lift or stair glide
- 10 Alerting devices, such as button alarms
- 95 Any other special features
- 96 None of these [Exclusive code]

*IF sharing ownership and there is at least one householder available for interview: HoTenu = 3 AND HoEli = 1*

**HoPart\***

What percentage of the property are you buying?

- 1 25 percent
- 2 50 percent
- 3 75 percent
- 4 other

*IF other percentage: HoPart = 4*

**HpOPr**

INTERVIEWER: ENTER OTHER PERCENTAGE

Range: 1..99

ENDIF

ENDIF

*IF renting or paying part rent and part mortgage AND there is at least one householder available for interview: (HoTenu = 3 OR 4) AND HoEli = 1*

**HoPeri\***

Thinking about your last rent payment, what period did this cover?

IF 100% RENT REBATE, CODE 97

- 1 One week
- 2 Two weeks
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)
- 97 DOES'T MAKE RENT PAYMENTS

*IF gave valid response regarding rent payment period and makes rent payments: HoPeri = RESPONSE AND HoPeri <> 97*

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**HoRent\***

How much was your last rent payment (including any services or charges but after any rebates)?

IF 100% RENT REBATE, CODE 99997

CHECK: IF rent is more than £300 per week OR more than £600 every two weeks OR more than £1200 per month OR more than £1500 per year: HoRent <> 99997 AND: (HoPeri = 1 AND HoRent > 300) OR (HoPeri = 2 AND HoRent > 600) OR (HoPeri = 4, 5 AND HoRent > 1200) OR (HoPeri = 3, 7, 26, 52, 90, 95 AND HoRent > 15000), INTERVIEWER: "Are you sure? ^Response at HoRent seems high - please check."

ENDIF

IF answered Don't Know or Refuse: (HoPeri = DK OR HoPeri = RF) OR (HoRent = DK OR HoRent = RF)

IF response is one week: HoPeri = 1

**HoRntWB**

Was it

Brackets: (20, 40, 60, 150)

ELSEIF answered two weeks: HoPeri = 2

**HoRntfB :**

Was it

Brackets: (40, 80, 120, 300)

ELSEIF answered four weeks or one month: HoPeri = 4, 5

**HoRntmB**

Was it

Brackets: (80, 160, 240, 600)

ELSEIF answered one year, lump sum: HoPeri = 52, 95

**HoRntyB**

Was it

Brackets: (1000, 2000, 3000, 7500)

ELSE

**HoRntoB**

Was it

Brackets: (80, 160, 240, 600)

ENDIF

ENDIF

IF valid response regarding rent payments: HoRent <> 99997 AND HoPeri <> 97

**HoIncl\***

SHOW CARD KK

Did your last rent payment include any of these?

PROBE: What else?

CODE ALL THAT APPLY

1 Water charges

- 2 Sewerage charges
- 3 Land or business premises
- 4 Separate Garage
- 5 Heating or lighting or hot water
- 6 Council Tax
- 96 None of these [Exclusive code]

**HoInca\***

SHOW CARD LL

Did your last rent payment include any of these?

PROBE: What else?

CODE ALL THAT APPLY

- 1 Meals
- 2 Gardening
- 3 Cleaning
- 4 Warden or porter
- 5 Security service/guard
- 95 Other services
- 96 None of these

*IF rent includes other services: HoInca = 95*

**HoOInc\***

What other services does your rent include?

WRITE IN

TEXT up to 60 characters

*ENDIF*

**HoRebt\***

Was any housing benefit such as rent rebate or rent allowance deducted from your last rent?

- 1 Yes
- 2 No

*ENDIF*

*IF does not make rent payments OR answered 100% rent rebate OR has benefit deducted from last rent: (HoPeri = 97) OR (HoRent = 99997) OR (HoRebt = 1)*

**HoReba\***

What would your last rent payment have been if housing benefit had not been deducted from it?

Range: 0..99997

CHECK: IF response at HoReba AND HoPeri <> 97 AND rent is more than £300 more per week OR more than £600 every two weeks OR more than £1200 per month OR more than £1500 per year: (HoPeri = 1 AND (HoReba > 300) OR (HoPeri = 2 AND HoReba > 600) OR (HoPeri = 4, 5 AND (HoReba > 1200) OR (HoPeri = 3, 7..26, 52, 90, 95 AND (HoReba > 15000)), - INTERVIEWER: "Are you sure? ^Response at HoReba seems high - please check.

*IF gave valid response and does not make rent payments: HoReba = RESPONSE AND HoPeri = 97*

**HoRebP\***

What period would this cover?

- 1 One week
- 2 Two weeks

- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

ENDIF

IF answered don't Know or Refusal about amount of rent paid or period: (HoReba = DK OR HoReba = RF) OR (HoPeri = DK OR HoPeri = RF) OR (HoRebP = DK OR HoRebP = RF)

IF answered one week: HoPeri = 1

**HoRebwb\***

Was it...

Brackets: (30, 50, 75, 150)

ELSEIF answered two weeks: (HoPeri = 2)

**HoRebfb**

Was it...

Brackets: (60, 100, 150, 300)

ELSEIF answered four weeks, one month: HoPeri = 4, 5

**HoRebmb**

Was it...

Brackets: (120, 200, 300, 600)

ELSEIF answered one year, lump sum: HoPeri = 52, 95

**HoRebyb**

Was it...

Brackets: (1500, 2500, 3750, 7500)

ELSE

**HoRebob**

Was it...

Brackets: (120, 200, 300, 600)

ENDIF

ENDIF

ENDIF

IF does not make rent payments OR answered 100% rent rebate:  
HoPeri = 97 OR HoRent = 99997

**HoHB\***

SHOW CARD LL

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```
| Does your accommodation include any of these?
| PROBE: What else?
| CODE ALL THAT APPLY
| 1 Meals
| 2 Garden
| 3 Cleaning
| 4 Warden or porter
| 5 Security service/guard
| 95 Other services
| 96 None of these [Exclusive code]
|
| IF includes other services: HoHB = 95
|
|   HoHBO*
|   What other services does your accommodation come with?
|   TEXT: up to 60 characters
|
| ENDIF
|
| ENDIF
|
| ENDIF
|
| IF owns accommodation outright, is buying with the help of a mortgage or
| loan, OR pays part rent and part mortgage (shared ownership) AND there is
| at least one householder eligible for interview: (HoTenu = 1, 2 OR 3) AND
| HoEli = 1
|
|   HoYear*
|   In what year did you buy this accommodation?
|   1900..2050
|
|   CHECK: IF bought accommodation after 2002: (HoYear = RESPONSE AND
|   Qinit.fwyear = RESPONSE) AND (HoYear > qinit.fwyear)- INTERVIEWER:
|   "This is later than ^QInit.fwyear! Please check!"
|
|   CHECK: IF bought accommodation in year later than interview date:
|   Qinit.Intdat = RESPONSE AND YEAR (Qinit.Intdat) < HoYear, -
|   INTERVIEWER: "This year is in the future! Please change!"
|
|   CHECK: IF bought accommodation in year earlier than date of birth: Idob =
|   RESPONSE AND YEAR(Idob) > HoYear - INTERVIEWER: "This is
|   before ^respondent was born! Please check!"
|
|   HoPay*
|   How much did you pay for the property?
|   ENTER AMOUNT TO THE NEAREST ££.
|   Range: 0..9999997
|
|   CHECK: IF paid more than £300000 for property: HoPay > 300000, -
|   INTERVIEWER: "Are you sure? ^Response at HoPay seems high - please
|   check.
|
|   IF does not know amount paid for property or refused to give
|   amount: HoPay = DK OR HoPay = RF
|
|   HoPayb
|   Was it
|   Brackets: (10000, 20000, 50000, 150000)
|
| ENDIF
```

**HoRTB**

SHOW CARD MM

Who did you buy this accommodation from?

CODE 'Right to Buy Scheme' AS 'Council or Local Authority'

CODE ONE ONLY

- 1 Private Owner
- 2 Council or Local Authority
- 3 Housing Association
- 4 Landlord
- 5 Family or relative
- 96 None of these

IF did not buy from council or local authority: HoRTB <> 2

**HoRTBe**

Have you ever bought a home from a council or local authority, for example under the Right to Buy scheme?

- 1 Yes
- 2 No

ENDIF

ENDIF

IF owns the accommodation AND there is at least one householder eligible for interview: HoTenu = 1 AND HoEli = 1

**HoEvM**

When you bought this accommodation, did you take out a mortgage?

- 1 Yes
- 2 No

IF took out a mortgage when bought accommodation: HoEvM = 1, ^txthol = Not including your original mortgage, did AND ^txtho2 = additional

ELSE: ^txthol = "did"

**HoOrm\***

^txthol you ever take out any ^txtho2 mortgages or loans secured on this property?

- 1 Yes
- 2 No

ENDIF

IF owns accommodation outright, is buying it with the help of a mortgage or loan OR pays part rent and part mortgage (shared ownership) AND there is at least one householder eligible for interview: (HoTenu = 1, 2 OR 3) AND HoEli = 1

**HoSellP\***

How much would you expect to get for your home if you sold it today?

Range: 0..9999997

CHECK: IF would expect to get more than £100000: HoSellP > 1000000, INTERVIEWER: "Are you sure? ^Response at HoSellP seems high - please check."

IF answered Don't know or Refuse regarding amount expected from

sale of home: HoSellP = DK OR HoSellP = RF

**HoSellpb\***

Would it be

Brackets:(50000, 75000, 125000, 500000)

ENDIF

ENDIF

IF is buying accommodation with the help of a mortgage or loan OR pays part rent and part mortgage (shared ownership) AND there is at least one householder eligible for interview: (HoTenu = 2 OR 3) AND HoEli = 1

**HoOutM\***

How many mortgages or loans do you have outstanding on this property?

Range: 1..10

Repeat HoMTy to HoYml for up to 5 mortgages mentioned at HoOutM

**HoMTy\***

SHOW CARD NN

Thinking about your <sup>^</sup>first/second/third/fourth/fifth mortgage or loan, what type or mortgage or loan is that?

PLEASE REFER TO ANNUAL STATEMENT OR MORTGAGE PAPER WORK WHERE POSSIBLE

- 1 A repayment mortgage or loan (where your mortgage payments cover interest and part of the original loan)
- 2 An endowment mortgage (where your mortgage payments cover interest only and you save separately to pay off the capital)
- 3 Part repayment and part endowment
- 4 A pension mortgage (where your mortgage payments cover interest only)
- 5 A PEP, ISA or Unit Trust mortgage
- 95 Other type of mortgage or loan
- 96 SPONTANEOUS [interest only mortgage]
- 97 SPONTANEOUS [Equity release]

IF other type of mortgage or loan: HoMTy = 95

**HoMto\***

What type of mortgage or loan is that?

WRITE IN

IF INTEREST ONLY GO BACK AND CODE THIS AT PREVIOUS QUESTION

Text up to 60 characters

ENDIF

IF not equity release mortgage or loan: HoMTy <> 97

**HoRmo\***

Does this mortgage or loan include any re-mortgage?

- 1 Yes
- 2 No

**HoMfv**

At the moment, is this mortgage or loan fixed or variable rate?

- 1 Fixed rate
- 2 Variable rate

IF has endowment mortgage OR part repayment and part endowment mortgage: HoMTy = 2 OR 3, ^vmltxt = "Not including the value of your endowment, how" AND ^reptxt = "the interest and premiums on your endowments and"  
ELSE: ^vmltxt = How

**HoVml\***

^vmltxt much do you currently owe on this mortgage or loan?  
Range: 0..9999997

CHECK: IF currently owes more than £500000: HoVml > 500000,  
INTERVIEWER: "Are you sure? ^Response at HoVml seems high - please check."

IF doesn't know or refused to give amount currently owed on mortgage or loan: HoVml = DK OR HoVml = RF

**HoVmb**

Is it  
Brackets: (10000, 25000, 50000, 250000)

ENDIF

IF has endowment mortgage or part repayment and part endowment:  
HoMTy = 2 OR 3

**HoVe\***

What is the current value of your endowment?  
Range: 0..9999997

CHECK: IF current value of endowment is more than £500000: HoVe > 500000 - INTERVIEWER: "Are you sure? ^Response at HoVe seems high - please check."

IF answered Don't know or Refuse: HoVe = DK OR HoVe = RF

**HoVeb**

Is it ...  
Brackets: (10000, 25000, 50000, 250000)

ENDIF

ENDIF

**HoYml**

How many years does this mortgage or loan have left to run?  
Range: 0..50

CHECK: IF years already paid plus years outstanding on mortgage is more than 30: HoYml + (2002-HoYear) > 30, INTERVIEWER: "This figure seems high. Please check."

ENDIF

ENDIF

**HoMrep\***

How much are your monthly repayments for all mortgages and loans outstanding on this property, including ^reptxt any insurance premiums?  
Range: 0..99997

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CHECK: IF monthly repayments are more than £2000: HoMrep > 2000, -  
INTERVIEWER: "Are you sure? ^Response at HoMrep seems high - please check."

IF does not know or refused to give amount of monthly repayments: HoMrep =  
DK OR HoMrep = RF

**HoMRepb\***

Are they

Brackets: (75, 150, 250, 1000)

ENDIF

**HoInc\***

Do these repayments include any of the following ... READ OUT EACH IN TURN  
AND CODE ALL THAT APPLY

- 1 ... a mortgage protection policy?
- 2 ... Buildings insurance?
- 3 ... Contents or possessions insurance?
- 4 ... other extra payments?
- 96 None of these [Exclusive code]

IF repayments include other extra payments: HoInc = 4

**HoInce\***

What else do your repayments include?

WRITE IN

Text: up to 60 characters

IF repayments include mortgage protection policy OR buildings  
insurance OR contents or possessions insurance OR other extra  
payments: HoInc = 1 OR 2 OR HoInc = 3 OR HoInc = 4

**HoIncC\***

How much of your monthly repayments are for those additional  
items?

Range: 0..9997

ENDIF

IF only one mortgage/loan on property outstanding AND that  
mortgage/loan does not include remortgage: HoOutM = 1 AND HoRmo = 2

**HoEvRE**

Not including your original mortgage did you ever take out any  
additional mortgages or loans on this property?

- 1 Yes
- 2 No

ENDIF

ENDIF

Time stamp at the beginning of Equity Release section  
TIME

IF owns accommodation outright, is buying with the help of a mortgage or  
loan OR is paying part rent and part mortgage (shared ownership) AND there  
is at least one householder eligible for interview: (HoTenu = 1, 2 OR 3)  
AND HoEli = 1

**HoRinc\***

It is possible to raise money based on the value of your home. These arrangements are sometimes known as equity release schemes. Have you ever raised any income or capital from the value of your current home through ...READ OUT...

- 1 ...a home income or mortgage annuity plan,
  - 2 a home reversion scheme,
  - 3 a private arrangement (for example with a relative,
  - 4 or, in some other way?
- 96 None of these

*IF has raised money from home in some other way: HoRinc = 4*

**HoOincX**

INTERVIEWER: RECORD DETAILS

Text: up to 40 characters

ENDIF

*IF has raised money from value of home through income or mortgage annuity plan: HoRinc = 1*

**HoRmol**

How much was the mortgage or loan?

Range: 0..9999997

CHECK: IF mortgage or loan is more than £200000: HoRmol > 200000, INTERVIEWER: "Are you sure? ^Response at HoRmol seems high - please check."

*IF does not know value if mortgage or loan OR refused to respond: HoRmol = DK OR HoRmol = RF*

**HoRMolb**

Was it

Brackets: (10000, 25000, 50000, 100000)

ENDIF

**HoRinm**

How much do you receive from this scheme per month?

Range: 0..99997

CHECK: IF receives more than £2000 from the scheme per month: HoRinm > 2000, INTERVIEWER: "Are you sure? ^Response at HoRinm seems high - please check."

*IF does not know income from scheme per month or refused to respond: HoRinm = DK OR HoRinm = RF*

**HoRinmb**

Is it

Brackets: (75, 150, 250, 1000)

ENDIF

ENDIF

*IF has raised money from home reversion scheme: HoRinc = 2*

**HoRpay**

Did you receive a one-off payment or do you get regular payments?  
1 One-off payment  
2 Regular payments

*IF received one-off payment: HoRpay = 1*

**Horpm**

How much was this one-off payment?

Range: 0..9999997

CHECK: IF value of one-off payment is more than £200000: Horpm > 200000, INTERVIEWER: "Are you sure? ^Response at Horpm seems high - please check."

*IF does not know amount of one-off payment or refused to respond: Horpm = DK OR Horpm = RF*

**Horpmb**

Was it

Brackets: (2500, 7500, 15000, 100000)

*ENDIF*

*ENDIF*

*IF receives regular payments: HoRpay = 2*

**HoMinc**

How much do you receive per month?

Range: 0..99997

CHECK: IF received more than £2000 per month: HoMinc > 2000, INTERVIEWER: "Are you sure? ^Response at HoMinc seems high - please check."

*IF does not know amount of regular payments or refused to respond: HoMinc = DK OR HoMinc = RF*

**HoMincb**

Is it

Brackets: (75, 150, 250, 1000)

*ENDIF*

*ENDIF*

**HoRms**

Do you pay a rent to remain in your home with this home reversion scheme?

1 Yes

2 No

*IF pays rent to remain in home as part of home reversion scheme: HoRms = 1*

**HoRrm**

How much rent do you pay per month?

Range: 0..99997

CHECK: IF rent is more than £2000 per month: HoRrm > 2000, INTERVIEWER: "Are you sure? ^Response at HoRrm seems high -

please check."

*IF does not know amount of monthly rent payments or refused to respond: HoRrm = DK OR HoRrm = RF*

**Horrm b**

Is it

Brackets: (75, 150, 250, 1000)

ENDIF

ENDIF

ENDIF

*IF has raised money from value of home through home income or mortgage annuity plan, home reversion scheme: HoRinc = 1 OR 2*

**HoRfee**

Was the fee that you paid to the insurer for taking out this scheme ... READ OUT...

- 1 ... a fixed amount,
- 2 a percentage of the value of the mortgage,
- 3 or, a percentage of the value of the house?

*IF fee was a percentage of the value of the mortgage: HoRfee = 2*

**HoRfep**

What was this percentage?

Range: 1..50

ENDIF

**HoAlf**

Did you pay an additional legal fee?

- 1 Yes
- 2 No

*IF has paid additional legal fee: HoAlf = 1*

**HoAlfm**

How much was this additional legal fee?

Range: 0..99997

CHECK: IF additional legal fee was more than £5000: HoAlfm > 5000, INTERVIEWER: Are you sure? ^Response at HoAlfm seems high - please check.

*IF does not know amount of additional legal fee or refused to respond: HoAlfm = DK OR HoAlfm = RF*

**HoAlfmb**

Was it ...

Brackets: (100, 250, 500, 2500)

ENDIF

ENDIF

**HoAli**

Have you taken out additional life insurance?

- 1 Yes
- 2 No

ENDIF

IF has raised money from value of property through a private arrangement: HoRinc = 3

**HoRpos**

Do you receive regular payments from any other source (for example, a relative) in return for a claim on the value of your property?

- 1 Yes
- 2 No

IF receives regular payments from any other source: HoRpos = 1

**HoRpof**

What period do these payments usually cover?

- 1 One week
- 2 Two weeks"
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

IF gave valid period of payments: HoRpof = RESPONSE

**HoRmu**

How much do you usually receive?

Range: 0..999997

CHECK: IF receives more than £300 per week OR more than £600 every two weeks OR more than £1200 per month OR more than £1500 per year: (HoRpof = 1 AND HoRmu > 300) OR (HoRpof = 2 AND HoRmu > 600) OR (HoRpof = 4, 5 AND (HoRmu > 1200) OR (HoRpof = 3, 7..26, 52, 90..95 AND (HoRmu > 15000) - INTERVIEWER: "Are you sure? ^Response at HoRmu seems high - please check."

ENDIF

IF does not know OR refuse to give period of payment OR how much usually receives: (HoRpof = DK OR HoRpof = RF) OR (HoRmu = DK OR HoRmu = RF)

IF response is one week: HoRpof = 1

**HoRmwb**

Is it

Brackets: (25, 50, 100, 1000)

```

ELSEIF response is two weeks: HoRpof = 2
|
|   HoRmfb
|   Is it
|   Brackets: (50, 100, 200, 2000)
|
|   ELSEIF response is four weeks, one month: HoRpof = 4, 5
|
|   HoRmmb
|   Is it
|   Brackets: (100, 200, 400, 4000)
|
|   ELSEIF response is one year, lump sum: HoRpof = 52, 95
|
|   HoRmyb
|   Is it
|   Brackets: (1250, 2500, 5000, 50000)
|
|   ELSE
|
|   HoRmob
|   Is it
|   Brackets: (100, 200, 400, 4000)
|
|   ENDIF
|
|   ENDIF
|
|   ELSEIF if response is no: HoRpos = 2
|
|   HoRpc
|   Have you ever received a payment from any other source (for
|   example, a relative) in return for a claim on the value of your
|   property?
|   1   Yes
|   2   No
|
|   IF has received a payment from any other source: HoRpc = Yes
|
|   HoRpcm
|   How much did you receive?
|   Range: 0..999997
|
|   CHECK: IF has received more than £200000: HoRpcm > 200000,
|   INTERVIEWER: Are you sure? ^Response at HoRpcm seems high -
|   please check."
|
|   IF doesn't know or refuse to give amount received: HoRpcm =
|   DK OR HoRpcm = RF
|
|   HoRpcmb
|   Was it
|   Brackets: (1000, 5000, 10000, 100000)
|
|   ENDIF
|
|   ENDIF
|
|   ENDIF
|
|   ENDIF

```

|  
ENDIF

**HoOld**

When was this property built?

- 1 Before 1919
- 2 1919-1944
- 3 1945-1964
- 4 1965-1984
- 5 1985 or later

**HoCTA\***

How much Council Tax do you currently pay?

CODE HOW ANSWER GIVEN

- 1 Annual Amount
- 2 Instalment
- 3 Does not pay Council Tax

IF pays council tax in annual amount: HoCTA = 1

| **HoCTY**

| INTERVIEWER: ENTER ANNUAL AMOUNT

| Range: 0..9997

| IF doesn't know or refused to give amount of council tax payment:

| HoCTY = DK OR HoCTY = RF

| **HoCTYb**

| Is it

| Brackets:(500, 750, 1000, 2000)

| ENDIF

ELSEIF pays council tax in instalments: HoCTA = 2

| **HOCTI**

| INTERVIEWER: ENTER AMOUNT OF INSTALMENT

| Range: 0..9997

| IF doesn't know or refused to give amount of instalment: HOCTI = DK OR

| HOCTI = RF

| **HoCTIb**

| Is it

| Brackets:(50, 75, 100, 200)

| ENDIF

| **HOCTN**

| How many instalments are there, over the whole year?

| Range: 1..50

ENDIF

IF pays council tax: HoCTA = 1 OR 2

| **HoCTB\***

| Are you allowed Council Tax benefit or rebate, to help pay your  
| Council Tax?

| IF is allowed Council Tax benefit or rebate: HoCTB = 1

**HoCTBA**

How much was allowed?

Range: 0..9997

*IF doesn't know or refused to give amount of council tax benefit or rebate: HoCTBA = DK OR HoCTBA = RF*

**HoCTBAb**

Was it

Brackets:(50, 75, 100, 200)

ENDIF

**HoCTBP**

What period did this cover?

- 1 One week
- 2 Two weeks"
- 3 Three weeks
- 4 Four weeks
- 5 Calendar month
- 7 Two Calendar months
- 8 Eight times a year
- 9 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One Year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

ENDIF

ENDIF

IF is allowed council tax benefit or rebate: HoCTB = 1, ^disctxt = In addition to your benefit, did  
ELSE ^disctxt = did

*IF pays council tax in annual amount or instalment AND there is only one person in household: (HoCTA = 1 OR 2) AND HHTot = 1*

**HoDisc\***

^disctxt you receive a 25% single person discount in relation to your Council Tax?

- 1 Yes
- 2 No

ENDIF

**HoSW**

How much did you pay for water and sewerage charges in the last year, that is since ^date a year ago?

Range: 0..9997

CHECK: IF paid more than £1500: HoSW > 1500, - INTERVIEWER: "Are you sure? Rates are normally below £30 a week."

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IF doesn't know or refused to give amount paid for water or sewerage: HoSW  
= DK OR HoSW = RF

**HoSWb**

Was it

Brackets: (50, 100, 200, 500)

ENDIF

IF does not live in accommodation rent free, squat or own it outright AND  
there is at least one householder eligible for interview: (HoTenu <> 5, 6  
OR 1) AND HoEli = 1

**HoDiff\***

Many people these days are finding it difficult to keep up with  
their housing payments. In the last 12 months would you say you  
have had difficulties paying for your accommodation?

- 1 Yes
- 2 No

IF rents accommodation: HoTenu = 4, ^RENT = rent

ELSEIF is buying it with the help of a mortgage or loan: HoTenu =  
2, ^RENT = mortgage

ELSEIF pays part rent and part mortgage (shared ownership): HoTenu = 3 ,  
^RENT = mortgage and rent

ELSE, ^RENT = rent/mortgage

**HoDifft\***

In the last 12 months have you ever found yourself more than two  
months behind with your ^RENT?

- 1 Yes
- 2 No

**HoDoc**

INTERVIEWER: CODE WHETHER RESPONDENT CONSULTED DOCUMENTS WHEN  
ANSWERING THE QUESTIONS ABOUT MORTGAGE / RENT

- 1 Respondent consulted documents
- 2 Respondent did not consult documents

**HoIntA**

INTERVIEWER: HOW ACCURATE DO YOU THINK THE ANSWERS GIVEN BY THE  
RESPONDENT WERE?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

ENDIF

**HoProb**

SHOW CARD 00

Does your accommodation have any of these problems?

PROBE: What others?

CODE ALL THAT APPLY

- 1 Shortage of space
- 2 Noise from neighbours
- 3 Other street noise, such as traffic, businesses,  
factories
- 4 Too dark, not enough light
- 5 Pollution, grime or other environmental problems caused by  
traffic or industry

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- 6 Rising damp in floors and walls
- 7 Water getting in from roof, gutters or windows
- 8 Bad condensation problem
- 9 Problems with electrical wiring or plumbing"
- 10 General rot and decay
- 11 Problems with insects, mice or rats
- 12 Too cold in winter
- 95 Other problems
- 96 None of these [Exclusive code]

*IF has other problems: HoProb = 95*

|  
| **HoProbo**  
| INTERVIEWER: ENTER OTHER PROBLEMS  
| Text: up to 40 characters  
|  
*ENDIF*

**HoCenh\***

Do you have any form of central heating in your accommodation?  
INCLUDE STORAGE HEATERS  
1 Yes  
2 No

**HoOhea\***

Do you use any other forms of heating?  
PROBE: What others?  
CODE ALL THAT APPLY  
1 Gas fire  
2 Electric Fire  
3 Paraffin Heaters  
95 Other (specify)  
96 No other heating [Exclusive code]

*IF uses other forms of heating: HoOhea = 95*

|  
| **HoOheo**  
| INTERVIEWER: RECORD OTHER TYPE OF HEATING  
| Text up to 40 characters  
|  
*ENDIF*

Time at start of durables  
TIME

**HoHave\***

SHOW CARD PP  
^Do you/does your household have any of the following items?  
PROBE: What others?  
CODE ALL THAT APPLY  
1 Television  
2 Video recorder  
3 CD player"  
4 Deep freeze or fridge freezer (exclude fridge only)  
5 Washing machine  
6 Tumble Dryer / Washer - Dryer  
7 Dish washer  
8 Microwave oven  
9 Computer  
10 On-line-digital/Satellite/Cable Television  
11 Phone (landline)

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- 95 All of these [Exclusive code]  
96 None of these [Exclusive code]

Time at start of Motor Vehicles  
TIME

**HoVeh\***

How many cars, vans or motorbikes, if any, do you own (including company or lease vehicles)?

Range: 0..20

Repeat HoVM to HoVVNO for 1-16 cars mentioned at HoVeh

**HoVM**

What make and model is the *^first* car, van or motorbike?

Text: up to 60 characters

**HoVW**

ASK OR CODE: Is this a car, a van or a motorbike?

- 1 Car
- 2 Van
- 3 Motorbike

IF car: HoVW = 1, *^carvan* = car

ELSEIF van: HoVW = 2, *^carvan* = van

ELSEIF answered motorbike: HoVW = 3, *^carvan* = Motorbike

ELSE, *^carvan* = car/van/motorbike

**HoVAg**

How old is this *^carvan*?

COLLECT AGE OF VEHICLE FROM TIME MADE EVEN IF BOUGHT SECOND HAND.

FOR PERSONALISED OR CHERISHED PLATES, RECORD YEAR VEHICLE WAS REGISTERED

Enumerated type

- 1 Answer given in year vehicle was registered
- 2 Answer given in registration letter (Letter at beginning)
- 3 Answer given in registration letter (Letter at the end)
- 4 Answer given in new registration number (Number in middle)

*IF answer given in year vehicle was registered: HoVAg = 1*

| **HoVYr**

| INTERVIEWER: ENTER YEAR

| 1900..2050

*ELSEIF answer given in registration letter (letter at beginning): HoVAg = 2*

| **HoVLr**

| INTERVIEWER: ENTER REGISTRATION LETTER

| Text: one character

*ELSEIF answer given in registration letter (letter at end): HoVAg = 3*

| **HoVEr**

| INTERVIEWER: ENTER REGISTRATION LETTER

| Text: one character

*ELSEIF answer given in new registration number (number in middle): HoVAg =*

3

| **HoVNr**

| INTERVIEWER: CODE NEW REGISTRATION NUMBER

```

| 1 51
| 2 02
| 3 other
|
| IF other registration number: HoVNr = 3
|
|   HoVNo
|   ENTER OTHER NEW REGISTRATION NUMBER
|   Range: 0..99
|
| ENDIF
|
ENDIF

```

IF more than one person in household: HHTot > 1

```

|   HoVOw
|   Who owns this ^carvan?
|   PROBE: Who else?
|   CODE ALL THAT APPLY
|   List 1-16 people in household that are eligible for answering this.
|   17 not a household member
|   18 Company/employer
|   19 Lease company
|
|   CHECK: IF 1-16 person do not exist in household grid: EBName =
|   EMPTY, - INTERVIEWER - THIS IS NOT A VALID PERSON NUMBER.
|   PLEASE CHANGE!
|
ENDIF

```

Time at beginning of food expenditure  
TIME

**HoFood\***

Now thinking about ^your household's weekly food bills, approximately how much do you usually spend in total on food and groceries - include all food, bread, milk, soft drinks, and meals on wheels. Exclude pet food, alcohol, cigarettes and meals out?  
WRITE IN TO NEAREST£.  
Range: 0..9997

CHECK: IF spends more than £300 per week: HoFood > 300, INTERVIEWER: "Are you sure? ^Response at HoFood seems high - please check."

IF doesn't know or refused to give weekly food expenditure: HoFood = DK OR HoFood = RF

```

|   Hofoodb
|   Is it usually
|   Brackets: (30, 50, 75, 150)
|
ENDIF

```

**HoOutf\***

Approximately how much do you usually spend in a week in total on takeways and food consumed out of the home - include all food consumed out of home e.g. restaurants, meals consumed at the workplace, etc?  
WRITE IN TO NEAREST £  
Range: 0..9997

ELSA Wave 1 Questionnaire - May 2002

*IF doesn't know or refused to give weekly expenditure on food consumed out of home: HoOutf = DK OR HoOutf = RF*

| **HoOutfb**

| Is it usually

| Brackets: (30, 50, 150, 500)

|  
ENDIF

CHECK: IF spends more than £1000 per week: HoOutf > 1000, INTERVIEWER: "Are you sure? ^Response at HoOutf seems high - please check."

**HoMeal\***

Can I just check, in the last 12 months that is since ^date a year ago did you (or anyone else in your household) ever cut the size of your meals or skip meals because there wasn't enough money for food?

1 Yes

2 No

*IF cuts the size or skips meals due to money shortage: HoMeal = 1*

| **HoMoft**

| Did this happen ... READ OUT ...

| 1 ... one or more times per month,

| 2 almost every month,

| 3 most months but not every month,

| 4 or, once or twice in the year?

|  
ENDIF

**Cognitive Function Module**

TIME

Time at start of cognitive test section (set by CfIntA)

**CfIntA**

In the next section of the interview, we will do some memory and concentration tasks and I will ask about your expectations for the future and how you feel now.

ENTER 1 AND CONTINUE

**CfMetM**

Part of this study is concerned with people's memory. How would you rate your memory at the present time? Would you say it is ...READ OUT...

- 1 excellent,
- 2 very good,
- 3 good,
- 4 fair,
- 5 or, poor?

**CfInt**

Now we will do the memory and concentration tasks. Some of them may seem rather easy but others are more difficult so please listen carefully. The tasks are designed so no-one gets the highest score possible. Please just do the best you can on all of them.

BEFORE STARTING THE TESTS, MAKE SURE RESPONDENT HAS GLASSES ETC IF NEEDED  
ENTER 1 AND CONTINUE

**CfDatD**

Please tell me today's date.

CODE WHETHER DAY OF MONTH (^today's date) GIVEN CORRECTLY

- 1 day of month given correctly
- 2 day of month given incorrectly/doesn't know day

**CfDatM**

CODE WHETHER MONTH (^today's date) GIVEN CORRECTLY

- 1 month given correctly
- 2 month given incorrectly/doesn't know month

**CfDatY**

CODE WHETHER YEAR (^today's date) GIVEN CORRECTLY

- 1 year given correctly
- 2 year given incorrectly/doesn't know day

**CfDay**

And please tell me what day of the week it is today?

CORRECT ANSWER: ^day of the week

- 1 day of week given correctly
- 2 day of week given incorrectly/doesn't know day

**TCfDscr**

Computed score from date questions

Range: 0..4

TIME

Time at start of everyday memory test (set by CfProM)

**CfProM**

Now I would like you to remember two things in order to assess everyday memory.

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The first is remembering to do a task. At some point during the interview I will hand you this clipboard and a pencil. (SHOW RESPONDENT THE CLIPBOARD). When I do I would like you to write your initials on the top left hand corner of the piece of paper attached to the clipboard. Is that clear?

IF 'no' EXPLAIN FURTHER

The second task is for you to remind me to do something. When we finish the memory and concentration tasks I will say 'That is the end of the memory and concentration tasks'. When I do I would like you to remind me to record what time we finish the tasks. Is that clear?

IF 'no' EXPLAIN FURTHER

Press <Enter> to continue.

TIME

Time at start of word memory test (set by CfLsInt)

**CfLsInt**

For the next task the computer will 'read' a list of words which I will ask you to recall. First I'd like to check that you will be able to hear the computer voice - please listen to this short message.

PRESS 1 AND ENTER TO ACTIVATE THE TEST MESSAGE.

**CfTest**

IF RESPONDENT CANNOT HEAR PROPERLY ADJUST VOLUME ON LAPTOP, THEN GO BACK TO THE PREVIOUS QUESTION AND PRESS 'ENTER' TO PLAY THE TEST MESSAGE AGAIN.

IF RESPONDENT STILL CANNOT HEAR PROPERLY CODE THAT YOU WILL READ OUT THE LIST YOURSELF.

- 1 List read out by computer
- 2 List read out by interviewer

**CfWrds**

Records word list used for this respondent.

Range: 1..4

*IF word list read out by interviewer rather than by computer: CfTest = 2*

**CfLisSt**

I will now read a set of 10 words. I would like you to recall as many as you can. We have purposely made the list long so it will be difficult for anyone to recall all the words. Most people recall just a few. Please listen carefully to the set of words as they cannot be repeated. When I have finished, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

IF NO, EXPLAIN FURTHER

READ OUT WORD LIST BELOW AT A SLOW STEADY RATE APPROXIMATELY ONE WORD EVERY 2 SECONDS.

*IF word list A is being used: CfWrds = 1*

WORD LIST A: Hotel River Tree Skin Gold Market Paper Child King  
Book

*ELSEIF word list B is being used: CfWrds = 2*

WORD LIST B: Sky Ocean Flag Dollar Wife Machine Home Earth  
College Butter

*ELSEIF word list C is being used: CfWrds = 3*

WORD LIST C: Woman Rock Blood Corner Shoes Letter Girl House  
Valley Engine

```

ELSE
WORD LIST D: Water Church Doctor Palace Fire Garden Sea Village
Baby Table
ENDIF
AFTER WORD LIST HAS BEEN READ OUT PRESS ENTER
ENDIF

IF list read out by computer: CfTest = 1

CfLis
The computer will now read a set of 10 words. I would like you to
recall as many as you can. We have purposely made the list long so it
will be difficult for anyone to recall all the words. Most
people recall just a few. Please listen carefully to the set of
words as they cannot be repeated. When it has finished, I will ask you to
recall aloud as many of the words as you can, in any order. Is this
clear?
IF NO, EXPLAIN FURTHER
IF YES, PRESS ENTER TO BEGIN TEST AND HAVE BOOKLET READY.

IF word list A is being used: CfWrds = 1

CfSndA
INTERVIEWER: AFTER WORD LIST HAS BEEN READ OUT PRESS ENTER
^Words from word list A above

ELSEIF word list B is being used: CfWrds = 2

CfSndB
INTERVIEWER: AFTER WORD LIST HAS BEEN READ OUT PRESS ENTER
^Words from word list B above

ELSEIF word list C is being used: CfWrds = 3

CfSndC
INTERVIEWER: AFTER WORD LIST HAS BEEN READ OUT PRESS ENTER
^Words from word list C above

ELSEIF word list D is being used: CfWrds = 4

CfSndD
INTERVIEWER: AFTER WORD LIST HAS BEEN READ OUT PRESS ENTER
^Words from word list D above

ENDIF
ENDIF

CfLisEn
Now please tell me the words you can recall.
^Words from whichever word list selected at CfWrds
WRITE WORDS IN BOOKLET PROVIDED.
ALLOW AS MUCH TIME AS RESPONDENT WISHES - UP TO 2 MINUTES
ENTER NUMBER OF WORDS RESPONDENT CORRECTLY RECALLS
Range: 0..10

TIME

```

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Time at start of animal test (set by CfAniSt)

**CfAniSt**

Now I would like you to name as many different animals as you can think of. You have one minute to do this. The computer voice will tell you when to stop. Ready, go.

PRESS 1 AND ENTER AS YOU SAY 'GO'.

TIME

(set by CfAni)

**CfAni**

WRITE ANIMALS MENTIONED IN BOOKLET PROVIDED.

ENTER NUMBER OF DIFFERENT ANIMALS MENTIONED

Range: 0..100

TIME

Time at start of prospective memory test (set by CfMem)

**CfMem**

ATTACH BOOKLET (OPEN TO THE LETTER CANCELLATION PAGE) TO THE CLIPBOARD AND HAND TO THE RESPONDENT ALONG WITH A PENCIL AND SAY:

These are for you.

PAUSE FOR EXACTLY 5 SECONDS. IF NO RESPONSE, PROMPT:

You were going to do something when I gave you the clipboard and pencil.

Can you remember what it was?

IF RESPONDENT SAYS 'AM I SUPPOSED TO....?' THEN SAY: 'Do whatever you think you are supposed to.'

CODE WHETHER OR NOT YOU PROMPTED RESPONDENT

1 No prompt given

2 Prompt given

TIME

Time at start of letter crossing test (set by CfLet)

**CfLet**

LETTER CANCELLATION PAGE

The next task is a measure of how rapidly you can do something. In a moment I will ask you to work through this list as quickly as you can crossing out all the P's and W's.

Start at the top left hand corner where the arrow is and work along the line. Then go to the beginning of the next line and work along the line again as if you were reading a page. Carry on this way crossing out all the P's and W's with one mark of pencil as in the example at the top of the page.

Please work as quickly and as accurately as you can. The computer voice will tell you when to stop.

You may begin now

PRESS 1 AND ENTER AS YOU SAY 'NOW'.

TIME

Time start of memory test - second (set by CfLetEn)

**CfLetEn**

AFTER THE COMPUTER SAYS 'STOP NOW', SAY:

Please underline the letter on which you finished.

NOW TAKE BACK THE BOOKLET AND CLIPBOARD

ENTER 1 AND CONTINUE

**CfMemS**

CODE WHAT RESPONDENT DID WHEN YOU HANDED THEM THE CLIPBOARD AND PENCIL

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- 1 Wrote their initials in top left hand corner
- 2 Wrote their initials somewhere else
- 3 Wrote something else in top left hand corner
- 4 Did something else
- 5 *^Did nothing/did not remember what to do*

**CfPAScr**

Score from first prospective memory test

**CfLisD**

A little while ago, you were read a list of words and you repeated the ones you could remember. Please tell me any of the words that you can remember now.

*^Words from whichever word list selected at CfWrds*

WRITE WORDS IN BOOKLET PROVIDED.

ALLOW AS MUCH TIME AS RESPONDENT WISHES - UP TO 2 MINUTES

ENTER NUMBER OF WORDS RESPONDENT CORRECTLY RECALLS.

Range: 0..10

**TIME**

Time at start of numeracy test (set by CfNInt)

**CfNInt**

Next I would like to ask you some questions which assess how people use numbers in everyday life.

IF NECESSARY, ENCOURAGE THE RESPONDENT TO TRY TO ANSWER EACH OF THE NUMERACY QUESTIONS

ENTER 1 AND CONTINUE

**CfSumB**

In a sale, a shop is selling all items at half price. Before the sale, a sofa costs £300. How much will it cost in the sale?

- 1 £150
- 2 £100
- 3 £200
- 4 £250
- 5 £600
- 95 Other answer
- 96 Doesn't know answer

**CfSumC**

If the chance of getting a disease is 10 percent, how many people out of 1,000 (one thousand) would be expected to get the disease?

- 1 100
- 2 10
- 3 90
- 4 900
- 95 Other answer
- 96 Doesn't know answer

**CfSumD**

A second hand car dealer is selling a car for £6,000. This is two-thirds of what it cost new. How much did the car cost new?

- 1 £9,000
- 2 £2,000
- 3 £3,000
- 4 £4,000
- 5 £8,000
- 6 £12,000
- 7 £18,000
- 95 Other answer

96 Doesn't know answer

*IF respondent responded incorrectly on all three previous maths questions*

**CfSumA**

If you buy a drink for 85 pence and pay with a one pound coin, how much change should you get back?

- 1 15 pence
- 2 25 pence
- 95 Other answer
- 96 Doesn't know answer

*ENDIF*

*IF respondent replied correctly to any of the first three maths questions:*

*CfSumB = 1 OR CfSumC = 1 OR CfSumD = 1*

**CfSumE**

If 5 people all have the winning numbers in the lottery and the prize is £2 million, how much will each of them get?

- 1 £400,000
- 2 £200,000
- 3 £250,000
- 4 £500,000
- 95 Other answer
- 96 Doesn't know answer

*ENDIF*

*IF respondent replied with the correct number of people that would be expected to get the disease, with the correct price of the car new, or with the correct amount received by each of the lottery winners: CfSumC = 1 OR CfSumD = 1 OR CfSumE = 1*

**CfSumF**

Let's say you have £200 in a savings account. The account earns ten per cent interest each year. How much would you have in the account at the end of two years?

- 1 £242
- 2 £202
- 3 £204
- 4 £210
- 5 £220
- 6 £240
- 95 Other answer
- 96 Doesn't know answer

*ENDIF*

TIME

Time at start of final section (set by CfEnd)

**CfEnd**

That is the end of the memory and concentration tasks.

PAUSE FOR EXACTLY FIVE SECONDS. IF NO RESPONSE, PROMPT:

You were going to do something when I said that. Can you remember what it was?

IF RESPONDENT SAYS 'Am I supposed to .....?' THEN SAY: 'Do whatever you think you are supposed to.'

CODE WHETHER OR NOT YOU PROMPTED RESPONDENT.

- 1 Prompt not given

2 Prompt given

**CfPMB**

CODE WHAT RESPONDENT DID

- 1 Reminded you to record the time
- 2 Did something else
- 3 *^Did nothing/did not remember what to do*

**CfWho**

INTERVIEWER: WAS THERE ANYONE OTHER THAN YOU AND RESPONDENT IN THE ROOM WHILE YOU WERE CONDUCTING THE COGNITIVE FUNCTION TESTS?

- 1 No [exclusive code]
- 2 Yes - respondent's spouse or partner
- 3 Yes - other household member (adult)
- 4 Yes - other household member (child)
- 5 Yes - not a household member"

**CfImp**

INTERVIEWER: WERE THERE ANY FACTORS THAT MAY HAVE IMPAIRED RESPONDENTS PERFORMANCE ON THE TESTS?

- 1 Yes
- 2 No

*IF interviewer thinks there are other factors that may have impaired the respondent's performance on cognitive function tests: CfImp = 1*

|  
| **CfWhat**  
| WRITE IN DETAILS  
|  
*ENDIF*

**Psychosocial Module**

TIME

Time at start of psychosocial section (set by PscedA)

**PScedi**

Now think about the past week and the feelings you have experienced. Please tell me if each of the following was true for you much of the time during the past week.

ENTER 1 AND CONTINUE

**PScedA**

(Much of the time during the past week), you felt depressed?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PScedB**

(Much of the time during the past week), you felt that everything you did was an effort?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PScedC**

(Much of the time during the past week), your sleep was restless?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PScedD**

(Much of the time during the past week), you were happy?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PScedE**

(Much of the time during the past week), you felt lonely?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PScedF**

(Much of the time during the past week), you enjoyed life?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PScedG**

(Much of the time during the past week), you felt sad?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PScedH**

(Much of the time during the past week), you could not get going?

PROMPT IF NECESSARY: Would you say yes or no?

1 Yes

2 No

**PsOld**

Please could you tell us at what age you consider old age to start?

ENTER AGE IN YEARS

Range: 30..100

**PsMid**

We would also like you to tell us at what age you consider middle age to end?

ENTER AGE IN YEARS

Range: 30..100

**Expectations Module**

TIME

Time at start of Expectations Module

**ExEvt**

SHOW CARD QQ

Now I have some questions about how likely you think various events might be.

When I ask a question I'd like you to give me a number from 0 to 100, where 0 means that you think there is absolutely no chance an event will happen, and 100 means that you think the event is absolutely certain to happen.

ENTER 1 AND CONTINUE

**ExRain**

SHOW CARD QQ

Let's try an example and start with the weather. What do you think the chances are it will be rainy tomorrow? (where 100 means a 100 percent chance of rainy weather and you can say any number from 0 to 100. For example, if you think there is a good chance that it will be rainy tomorrow, you might say there is an 80 percent chance of rain.)

Range: 0..100

IF aged 65 or under: IAgeof <= 65, ^Age1Txt = 75.  
 ELSEIF aged 66 to 69: iAgeof <= 69, ^Age1Txt = 80.  
 ELSEIF aged 70 to 74: iAgeof <= 74, ^Age1Txt = 85.  
 ELSEIF aged 75 to 79: iAgeof <= 79, ^Age1Txt = 90.  
 ELSEIF aged 80 to 84: iAgeof <= 84, ^Age1Txt = 95.  
 ELSEIF aged 85 to 99: iageof <= 99, ^Age1Txt = 100.  
 ELSEIF aged 100 to 104: iageof <= 104, ^Age1Txt = 105.  
 ELSEIF aged 105 to 109: iageof <= 109, ^Age1Txt = 110.  
 ELSEIF aged 110 to 119: iageof <= 119, ^Age1Txt = 120.

**ExLo80**

SHOW CARD QQ

What are the chances that you will live to be ^Age1Txt or more?

Range: 0..100

IF a woman under age 60 or a man under age 65: (Isex = 2 AND IAgeof < 60)  
 OR (ISex = 1 AND IAgeof < 65)

```
|
| IF a woman aged 54 or under: ISex = 2 AND IAgeof <= 54, ^agetxt =
| 55.
| ELSEIF a woman aged 55 to 59: ISex = 2 AND IAgeof <= 59,
| ^agetxt = 60.
| ELSEIF a man aged 59 or under: ISex = 1 AND IAgeof <= 59, ^agetxt = | 60.
| ELSEIF a man aged 60 to 64: ISex = 1 AND IAgeof <= 64, ^agetxt =
| 65.
|
```

**ExPW**

SHOW CARD QQ

Thinking about paid work in general (*and not just your present job*) what are the chances that you will be working after you reach age ^agetxt?

Range: 0..100

ENDIF

*IF in paid work or self-employed during the last month, or temporarily away from paid work, AND IF under age 65: ((WpAct = 1 OR 2) OR WPAWAY = 1) AND IAgeof < 65*

**ExHLim**

What are the chances that your health will limit your ability to work before you reach age 65?

Range: 0..100

ENDIF

**ExRSLF**

SHOW CARD QQ

What are the chances that at some point in the future you will not have enough financial resources to meet your needs?

Range: 0..100

**ExAInh**

SHOW CARD QQ

Including property and valuables, what are the chances that you will receive any inheritance during the next 10 years?

Range: 0..100

IF some chance respondent will receive an inheritance during the next 10 years or doesn't know if any chance of receiving an inheritance in the next 10 years: ExAInh > 0 OR ExAInh = DK

**ExCinh**

SHOW CARD QQ

What are the chances that you will receive an inheritance totalling £10,000 or more during the next 10 years?

Range: 0..100

IF some chance respondent will receive an inheritance totalling £10,000 or more during the next 10 years or doesn't know if any chance of receiving an inheritance totalling £10,000 or more in the next 10 years: ExCinh > 0 OR ExCinh = DK

**ExInhe**

SHOW CARD QQ

What are the chances that you will receive an inheritance totalling £100,000 or more during the next 10 years?

Range: 0..100

ENDIF

ENDIF

**ExCin**

SHOW CARD QQ

Including property and other valuables that you (^and your husband/wife/partner) might own, what are the chances that you (^and your husband/wife/partner) will leave an inheritance totalling £50,000 or more?

Range: 0..100

IF no chance of leaving an inheritance totalling £50,000 or more, or doesn't know whether there is any chance of leaving an inheritance totalling £50,000 or more: ExCin = 0 OR DK

**ExCain**

SHOW CARD QQ

What are the chances that you ^and your husband/wife/partner will leave any inheritance?"

Range: 0..100

```
|  
ENDIF  
  
IF some chance of leaving an inheritance totalling £50,000 or more: ExCin >  
0  
|  
| ExCpin  
| SHOW CARD QQ  
| What are the chances that you ^and your husband/wife/partner will  
| leave an inheritance totalling £150,000 or more?  
| Range: 0..100  
|  
ENDIF
```

**ExHVR**  
Text for ^increase/decrease and ^5%/10% allocated randomly

**ExHVa**  
SHOW CARD QQ  
What are the chances that the value of your house will ^increase/decrease  
by more than ^5%/10% over the next year?  
CODE 997 IF RESPONDENT DOES NOT OWN THEIR HOUSE  
Range: 0..997

CHECK: IF response at EXHVa is between 101 and 996: ExHVa is not a valid  
answer! Please change!

**ExPlan**  
SHOW CARD RR  
In deciding how much of your ^family's income to spend or save, people are  
likely to think about different financial planning periods. In planning  
your ^family's saving and spending, which of the following time periods is  
more important to you ^and your husband/wife/partner?  
IF UNABLE TO GIVE ANSWER FROM CARD, PROBE FOR SPONTANEOUS CODES:  
1 The next few weeks  
2 The next few months  
3 The next year  
4 The next few years  
5 The next 5-10 years  
6 Longer than 10 years  
7 SPONTANEOUS [ Plans day to day]  
8 SPONTANEOUS [ Plans over other period]  
9 SPONTANEOUS [ Does not plan]

IF plans over another period: ExPlan = 8

```
|  
| ExPPer  
| INTERVIEWER: ENTER OTHER PERIOD  
| Text: up to 20 characters  
|  
ENDIF
```

**Final Questions Module**

TIME

Time at start of Final Questions Module

**FqNr\***

Now I have some final questions before we reach the end of the interview.  
ENTER 1 AND CONTINUE

*IF don't already have respondent's ethnicity from HSE: HSE.EthnicI <>  
RESPONSE*

**FqEthn\***

SHOW CARD SS

Can I check, to which of the groups on this card do you consider  
that you belong?

CODE ONE ONLY.

- 1 White
- 2 Mixed ethnic group
- 3 Black
- 4 Black British
- 5 Asian
- 6 Asian British
- 95 Any other group

*IF ethnicity is white: FqEthn = 1*

**FqWCult\***

What is your cultural background?

Is it ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

- 1 English?
- 2 Irish?
- 3 Scottish?
- 4 Welsh?
- 5 Other European?
- 95 any other cultural background? (specify)

*ELSEIF ethnicity is mixed: FqEthn = 2*

**FqBcg\***

What is your cultural background?

Is it ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

- 1 White British and Black Caribbean?
- 2 White British and Black African?
- 3 White British and Asian?
- 95 any other cultural background?(specify)

*ELSEIF ethnicity is black or black British: FqEthn = 3 OR 4*

**FqBack\***

What is your cultural background?

Is it ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

- 1 Caribbean?
- 2 African?
- 95 any other cultural background? (specify)

*ELSEIF ethnicity is Asian or Asian British: FqEthn = 5 OR 6*

**FqCbac\***

What is your cultural background?

Is it ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

- 1 African-Indian?
- 2 Indian?
- 3 Pakistani?
- 4 Bangladeshi?
- 95 any other cultural background? (specify)

*ELSEIF respondent is another ethnicity: FqEthn = 95*

**FqCulb\***

What is your cultural background?

Is it ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...

- 1 Chinese?
- 2 Japanese?
- 3 Philippino?
- 4 Vietnamese?
- 95 any other cultural background? (specify)

*ENDIF*

*IF cultural background not described by any of the categories above: FqWCult OR FqBcg OR FqBack OR FqCbac OR FqCulb = 95*

**FqCulto\***

How would you describe your cultural background?

Text: up to 60 characters

*ENDIF*

*ENDIF*

*IF don't already have respondent's country of birth from HSE: HSE.PoB <> RESPONSE*

**FqCbth\***

In which country were you born?

- 1 England
- 2 Scotland
- 3 Wales
- 4 Northern Ireland
- 5 Republic of Ireland
- 6 Elsewhere outside of UK

*IF not born in England: FqCbth = 2, 3, 4, 5 OR 6*

**FqCeng\***

In what year did you come to live in England?

WRITE IN YEAR

Range: 1900..2050

CHECK: IF reported year of arrival to England is after current year: FqCeng >= QInit.FWYear, INTERVIEWER: This is later than ^current year! Please check!

CHECK: IF year of interview before reported year of arrival to England: YEAR(Qinit.Intdat) <= FqCeng, INTERVIEWER: This year is in the future (^reported year of arrival to England)! Please change!

CHECK: IF respondent's year of birth is after reported date of arrival to England: YEAR(Idob[pnum]) >= FqCeng, INTERVIEWER: This is before ^respondent's name was born! Please check!

CHECK: IF respondent had an HSE interview and the date of this interview was before the reported date of arrival to England:  
 FqCeng >= hse, INTERVIEWER: This suggests ^respondent's name came to live in England after they completed the HSE interview (The HSE interview was in ^date of HSE interview. Please check

ENDIF

ENDIF

IF provided information regarding educational qualifications at HSE:  
 HSE.Qual = RESPONSE

**FqMqua\***

Since the last time that we interviewed you ^date of HSE interview, have you obtained any further qualifications?

- 1 Yes
- 2 No

ENDIF

IF do not have information on educational qualifications from HSE or respondent has obtained further qualifications since HSE interview:  
 HSE.Qual <> RESPONSE) OR FqMqua = 1

**FqQual\***

SHOW CARD TT

Which of the qualifications on this card ^do you have/have you obtained since then? Just tell me the number written beside each one.

RECORD ALL THAT APPLY. PROBE: 'Any others?'

- 1 Degree/degree level qualification (including higher degree)
- 2 Teaching qualification
- 3 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
- 4 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTECH Higher
- 5 ONC/OND/BEC/TEC/BTEC not higher
- 6 City and Guilds Full Technological Certificate
- 7 City and Guilds Advanced/Final Level
- 8 City and Guilds Craft/Ordinary Level
- 9 A-levels/Higher School Certificate
- 10 AS level
- 11 SLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies
- 12 O-level passes taken in 1975 or earlier
- 13 O-level passes taken after 1975 GRADES A-C
- 14 O-level passes taken after 1975 GRADES D-E
- 15 GCSE GRADES A-C
- 16 GCSE GRADES D-G
- 17 CSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3
- 18 CSE GRADES 2-5/SCE Ordinary BANDS D-E
- 19 CSE Ungraded
- 20 SLC Lower
- 21 SUPE Lower or Ordinary
- 22 School Certificate or Matric
- 23 NVQ Level 5
- 24 NVQ Level 4
- 25 NVQ Level 3/Advanced level GNVQ
- 26 NVQ Level 2/Intermediate level GNVQ
- 27 NVQ Level 1/Foundation level GNVQ
- 28 Recognised Trade Apprenticeship completed

- 29 Clerical or Commercial Qualification (eg typing/book-keeping/commerce)
- 95 Other qualifications
- 96 None of these [exclusive code]

*IF has other qualification not listed: FqQual = 95*

**FqOQ\***

What qualifications are these?

RECORD ALL OTHER QUALIFCATIONS IN FULL.

PROBE: 'What else?'

Text: up to 60 characters

*ENDIF*

*ENDIF*

*IF do not have information on age finished full-time education from HSE:  
HSE.EducEnd <> RESPONSE*

**FqEnd\***

At what age did you finish continuous full-time education at school or college?

- 1 Not yet finished
- 2 Never went to school
- 3 14 or under
- 4 at 15
- 5 at 16
- 6 at 17
- 7 at 18
- 8 19 or over

*ENDIF*

TIME

Time at the beginning of consents section

**FqAddr\***

Sometime in the next two years, we will wish to contact you again.

In case you move from this address, could you tell me the address and telephone number of a relative or close friend we could contact to find out where you are?

IF GIVEN, WRITE ON ARF AT E1

- 1 Willing to give contact address
- 2 Unwilling to give contact address
- 3 Does not wish to be re-contacted

**FQCons**

We have asked about your health and economic circumstances. To make this information complete we would like to find out more about your health and treatment and more about your National Insurance contributions, social security benefits and tax credits. We would like to collect this information from administrative records held by the Office for National Statistics, the National Health Service, Inland Revenue and the Department for Work and Pensions. Like everything else you have told us, the information collected from these records will be completely confidential. This form explains in more detail and you can ask me any questions that you may have.

IF RESPONDENT SIGNS FORM, REMEMBER TO LEAVE THEM THE WHITE TEAR-OFF COPY

ELSA Wave 1 Questionnaire - May 2002

PRESS F9 FOR HELP ON WHERE TO FIND NI NUMBER HLP NATIONAL INSURANCE NUMBER  
CAN BE FOUND ON PAYSIP, BENEFIT BOOK, TAX RETURN

- 1 Signed consent given
- 2 No consent given

CHECK: IF no consent given: FQCons = 2, INTERVIEWER: Have you given the  
respondent the copy of the consent form?

**Titl\***

INTERVIEWER: CHECK/COLLECT RESPONDENTS TITLE, FIRST NAME AND SURNAME  
IF DIFFERENT, WRITE ON ARF AT E1  
ENTER 1 AND CONTINUE

**Addr\***

INTERVIEWER: CHECK ADDRESS AS WRITTEN ON THE ARF IS CORRECT. IF NOT,  
CORRECT.  
ENTER 1 AND CONTINUE

**Tel\***

INTERVIEWER: CHECK/COLLECT RESPONDENTS TELEPHONE NUMBER WRITE ON ARF, IF  
DIFFERENT  
ENTER 1 AND CONTINUE

**Email\***

INTERVIEWER: ASK RESPONDENT FOR THEIR EMAIL ADDRESS (IF THEY HAVE ONE).  
IF GIVEN, WRITE ON ARF AT E1  
ENTER 1 AND CONTINUE

**FqHelp**

INTERVIEWER: DID RESPONDENT NEED ANY HELP READING THE SHOWCARDS DURING THE  
INTERVIEW?

- 1 Yes - due to sight problems
- 2 Yes - due to literacy problems
- 3 No