

# 1 - HOUSEHOLD DEMOGRAPHICS MODULE (HD)

**Note:** At Wave 11, some unproductive individuals from the Wave 10 refreshment sample were issued again. Some of these respondents were in households with people who were productive at Wave 10. In Wave 11 in these households, the respondents who were unproductive at Wave 10 were considered as “refreshment” cases whereas those who were productive were considered as “existing” sample. The household as a whole was considered as an “existing” sample household. In order to collect the necessary data for these respondents, a refreshment flag at the individual level was created: RefreshIV. The derivation for RefreshIV is as follows:

**If Cohort<10, RefreshIV = No**  
**If Cohort=10 and IVout<30, RefreshIV = No**  
**If Cohort=10 and IVout=>30, RefreshIV = Yes**  
**If Cohort=11, RefreshIV = Yes**

If not video interview

[VAPI <>1]

## **HDDocRim\***

INTERVIEWER: Please provide a copy of the showcards or alternatively ask the respondent if they can access the showcard on their own device. They can be found at “natcen.ac.uk/elsa-showcards-w11”

Please also hand them now a:

- Measurement card to be used later in the interview (for each person you’re interviewing)
- Self completion questionnaire (for each person) – unless you have sent this upfront. But ask them not to complete it now.

IF APPLICABLE, also remember to give them:

- Consultee Letter
- Consultee Declaration Form – ask them to sign this and give it to you to post to the

office

END OF FILTER

## **DHSAMEH\***

ASK or CODE: Are you living at the same address as when we last interviewed you [^date of last interview]?

1 Yes

2 No

**Text description of [^date of last interview]**

**PROGRAMMING NOTE:** IF (interviewing at new split household) DHSameH is computed as ‘No’ [IF HHNo >1, DHSameH:=2]

## **DHINT**

(As you know) this is a study about the health and lifestyles of people aged 50 and over.

[^BLANK/During the interview, some of the questions you are asked will

be new to you and others will check or update information that we asked about last time. This is because we are interested in understanding what has stayed the same and what has changed.]

I would like to begin by checking our details about who lives in this household.

INTERVIEWER: Enter 1 to continue.

Range: 1..1

*IF Number of people who have moved out in previous waves > 0*

*[NOFMov > 0]*

### **DHBACK**

Before beginning the interview, I just need to check whether there have been changes in who lives in this household.

Our records show that the following people have previously lived in this household.

Have any of them returned to the household? Do any of them live here now?

CODE ALL THAY APPLY.

01 [^<Name of Mover1>]

02 [^<Name of Mover2>]

03 [^<Name of Mover3>]

04 [^<Name of Mover4>]

05 [^<Name of Mover5>]

06 [^<Name of Mover6>]

07 [^<Name of Mover7>]

08 [^<Name of Mover8>]

09 [^<Name of Mover9>]

10 [^<Nameof Mover10>]

11 [^<Nameof Mover11>]

12 [^<Nameof Mover12>]

96 None of these

***[code maximum 12 out of 13 possible responses]***

***[CHECK DH1] CHECK:*** *IF (names of people who have moved back in = none of these) AND (names of people who have moved back in = at least one other answer)*

*[DhBack = 96 AND DhBack = [1...12]*

*'None of these' is an exclusive code for this question.*

***[CHECK DH2] CHECK:*** *IF names of people who have moved back in = myloop*

*[DhBack = 1...12]*

*CHECK: IF what has happened to person = living elsewhere [DHWhat = 2...4]*

*[^myloop] is not a valid person number.*

END OF FILTER

### **HHPrev**

Computed: Complete household size (by previous wave)

0..16

LOOP FOR EACH PERSON IN HOUSEHOLD

*IF (A previous household member OR Person has moved back in household) AND (Whether anyone else lives here=Yes)*

*[(Person Number =< HHPrev OR Mentioned in DhBack) AND DhElse=1)]*

*IF(Death status in the feed-forward data = Thought to have died but confirmation needed [ff\_Dead = 3]*

**DHDIEDC**

INTERVIEWER: OUR RECORDS SHOW THAT [^NAME] HAS DIED. IS THIS CORRECT?

Only ask respondent if you don't know

- 1 Yes
- 2 No

END OF FILTER

*IF whether confirmed died = yes THEN DhName is prefilled with 'No'*

*[DHDiedC = 1 THEN DHName=2]*

*IF whether confirmed died=NO or there is no feed forward or not known information about dead DHDiedC=2 OR dead=0 or -1] THEN ASK DHNAME*

**DHNAME**

Does [^<First name from last interview>][^BLANK/still] live here?

INTERVIEWER: If respondent is in an institution code 'No'."

- 1 Yes
- 2 No

END OF FILTER

*IF (whether still lives here = No) AND (confirmed died <> Yes)*

*[DhName = 2 AND DHDiedC <> 1]*

**DHWHAT**

May I ask what has happened to [^<First name from last interview>]?

- 1 Deceased
  - 2 Living elsewhere - relationship ended
  - 3 Living elsewhere - moved into a nursing/residential home
  - 4 Living elsewhere - other reason
  - 5 Member of the core household
- (Note code 5 is only valid for new households)*

*[CHECK DH3] CHECK: IF Household is NOT a new household and DHWHAT=5*

*Code 5 is only valid for new households.*

END OF FILTER

*IF reason for not living here = Deceased or confirmed died = yes*

*[DhWhat = 1 or DHDiedC = 1 ]*

**DHEIINT**

I am sorry to hear that [^<First name from last interview >] has passed away. I just need to ask a few questions to check that we have the correct information about him/her.

INTERVIEWER: Press 1 and <Enter> to continue.

Range: 1..1

END OF FILTER

END OF FILTER

*IF (no name present)*

*[DhNN= EMPTY]*

**NAME**

INTERVIEWER: Enter the first name of the [*^first/next household member*].

STRING

*PROGRAMMING NOTE: IF DHNN = RESPONSE compute NAME = upper case DHNN*

END OF FILTER

*IF (whether still lives here= Yes) OR (reason for not living here = Living elsewhere- moved to elsewhere- moved to a nursing/residential home, Deceased)*

*[IF DHNAME = 1 OR DHWHAT = 3, 1]*

**DHNC**

INTERVIEWER: ASK OR CODE: Is the first name (*[^<First name from last interview]*) correct?

1 Yes

2 No

*PROGRAMMING NOTE: IF DHNC = Yes compute DHNN = upper case NAME. IF DHNC <> Yes compute DHNN = upper case DHNN.*

*IF (first name is not correct) [DHNC = No]*

**DHNN**

INTERVIEWER: ENTER CORRECT FIRST NAME.

String: 20

*PROGRAMMING NOTE: IF DhNN = RESPONSE compute Name = DhNN*

END OF FILTER

END OF FILTER

*IF (whether still lives here = Yes) OR (reason for not living here = living elsewhere – moved to a nursing/residential home, Deceased) AND (Surname from last interview = RESPONSE)*

*[{DhName = 1 OR DhWhat = 3, 1) AND Surname from last interview = RESPONSE}]*

**DHSC**

INTERVIEWER ASK OR CODE: Is the surname (*[^<Surname from last interview]*) correct?

1 Yes

2 No

*IF (previous surname is not correct or no surname present)*

*[IF DHSC = No OR no surname in data]*

**DHNSN\***

INTERVIEWER: ENTER CORRECT SURNAME.

STRING

*[CHECK DH] SIGNAL If DhNSN <> RESPONSE:*

"INTERVIEWER: Please try to get a surname name. Reassure the respondent that this information will not be used for anything except making it easier to communicate with people, if needed, in the future

END OF FILTER

END OF FILTER

*IF (whether still lives here = Yes) OR (reason for not living here = living elsewhere – moved to a nursing/residential home, Deceased)*  
*[DhName = 1 OR DhWhat = 3, 1]*

*IF Sex from last interview = RESPONSE [Sex (Last int) = RESPONSE]*

**DHSEXC**

ASK OR CODE: Can I just check, [^is/was] [^<correct first name>] [^sex from last interview]?

- 1 Yes
- 2 No

END OF FILTER

*IF (correct sex check = No) OR (Sex from last interview = NA, DK, REF, empty)*  
*[DhSexC = 2 OR Sex (Last int) =9991, 9998, 9999, EMPTY]*

**DHSEX**

INTERVIEWER: Ask or code [^<correct first name>]'s sex.

- 1 Male
- 2 Female

END OF FILTER

*IF (whether still lives here = Yes) OR (reason for not living here = Living elsewhere, Deceased)*  
*[DhName = 1 OR DhWhat = 3, 1]*

*IF date of birth from last interview = RESPONSE [DoB (Last int) = RESPONSE]*

**DHDOBC**

Can I just check, [^is/was] [^<correct first name>]'s date of birth [^<date of birth from last interview>]?

- 1 Yes
- 2 No

END OF FILTER

*IF (Date of birth check = No) OR (DoB from last interview =NA, DK, Ref, new partner)*  
*[DhDoBC = 2 OR DoB (Last int) = 9991,9998,9999,empty]*

**DHDOB \* @ (derived variable DOBDAY (Day of Birth) is archived under SA; derived variable DOBMONTH (Month of Birth) is archived under SL; derived variable DOBYEAR (Year of Birth) is archived under SL; recoded variable INDOBYR – which collapses year of birth 90+ – is archived under EUL)**

What [^is/was] [^<correct first name>]'s date of birth?

DD/MM/YYYY

**[CHECK DH4] SIGNAL:** IF date of interview minus the date of birth is greater than 100 years  
IF [INTDat- DHDOB]>100  
(INTERVIEWER: Are you sure? That means the respondent is over 100 years old.)

**[CHECK DH5] SIGNAL:** IF date of birth is later than the date of interview  
IF [DhDob> IntDat]  
INTERVIEWER: This date is in the future (^dhdob)! Please change!

**DHAGE**

Asked or Computed: What [^is/was] [^<correct first name>]'s age last birthday?  
RANGE: 0..120

*PROGRAMMING NOTE: If age computed from DHDOB is a valid number and less than 120, compute DHAGE based on DHDOB. UF DHDOB <> RESPONSE OR age based on DHDOB is over 120, ask DHAGE*

**[Ages from DHAGE and DIAG are combined in derived variable INDAGE. INDAGE is archived under SL. A separate DV INDAGER – which recodes ages 90 or over to "-7" to avoid disclosure– is archived under EUL.]**

END OF FILTER

IF date of birth <> RESPONSE [DhDob <> RESPONSE]

IF age at last birthday = DK [DhAge = DK]

**DHEAG**

Is [^<correct first 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?

END OF FILTER

END OF FILTER

END OF FILTER

IF (whether still lives here = Yes) AND (age at last birthday >= 16)  
[DhName = 1 AND DhAge >= 16]

**DHWORK \***

Last week was [^<correct first name>] in paid employment including being away temporarily from a job [^he/she] would normally be doing?

- 1 Yes
- 2 No

END OF FILTER

LOOP FOR EACH PERSON 1 TO 16 STILL PRIMARILY ASSOCIATED WITH THIS HOUSEHOLD:

IF (whether still lives here = Yes) OR (reason for not living here = Living elsewhere–  
moved to a nursing/residential home, Deceased)

[DhName = 1 OR DhWhat = 3, 1]

IF Feed forward Relationship to other HH member = RESPONSE [Feed-forward  
relationship code R = RESPONSE]

**DHRC \***

And, [^is/was] [^<correct first name>]s [^husband/wife/partner/etc.]?

1 Yes

2 No

END OF FILTER

IF (whether previous relationship confirmed = No) OR (Feed forward Relationship  
to other HH member <>RESPONSE)

[DhRC = 2 OR Feed-forward relationship code R <> RESPONSE]

**DHR \***

SHOW CARD A1

What is [^<correct first name>]'s relationship to [^<other HH member>]. Please  
choose a number from this card.

INTERVIEWER: Code 2 for Civil Partners.

01 Husband/Wife

02 Partner/cohabitee

03 Natural son/daughter

04 Adopted son/daughter

05 Foster son/daughter

06 Step son/daughter/child of partner

07 Son/daughter-in-law

08 Natural parent

09 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

[Don't Know and Refusal are not allowed]

Description	Variable	Archive
Relationship of this Person to Person 1 in the Household	DhR	DhR
Relationship of this Person to Person 2 in the Household	DhR2	DhR2
Relationship of this Person to Person 3 in the Household	DhR3	DhR3
Relationship of this Person to Person 4 in the Household	DhR4	DhR4
Relationship of this Person to Person 5 in the Household	DhR5	DhR5
Relationship of this Person to Person 6 in the Household	DhR6	DhR6

Relationship of this Person to Person 7 in the Household	DhR7	DhR7
Relationship of this Person to Person 8 in the Household	DhR8	DhR8
Relationship of this Person to Person 9 in the Household	DhR9	DhR9
Relationship of this Person to Person 10 in the Household	DhR10	DhR10
Relationship of this Person to Person 11 in the Household	DhR11	DhR11
Relationship of this Person to Person 12 in the Household	DhR12	DhR12
Relationship of this Person to Person 13 in the Household	DhR13	DhR13
Relationship of this Person to Person 14 in the Household	DhR14	DhR14
Relationship of this Person to Person 15 in the Household	DhR15	DhR15
Relationship of this Person to Person 16 in the Household	DhR16	DhR16

**[CHECK DH6] CHECK:** CHECK: relationship to other household members = this code not used [IF DhR = 96]  
Code 96 is not valid for this question.

**[CHECK DH7] SIGNAL:** IF relationship to other household members = [Spouse /Partner / Cohabitee] [DhR = 1, 2]  
Are you sure? *^DhNN is only ^DHAge years old. Please check.*

**[CHECK DH8] SIGNAL:** IF relationship to other household members = natural parent, adoptive parent, foster parent, step-parent, parent's partner, parent-in-law, grandparent  
[DhR = 8...12, 20]  
You've coded ^DhNN as a parent (inc. foster/in-law/step) or a grandparent, but *^heshe is less than 16 years old. Please check ^DhNN's age.*

**[CHECK DH9] CHECK:** IF more than one other person selected as partner/spouse/ cohabitee  
^P[P1].Name has more than one spouse / cohabitee. Establish who is principal partner.

**[CHECK DH10] SIGNAL:** IF Married partners are of same sex [P1.DhSex = P2.DhSex]  
As of 29 March 2014 same sex couples can marry in England and Wales.  
Please check if the respondents in this couple are married or are in a civil partnership, and code appropriately.

**[CHECK DH11] SIGNAL:** IF relationship to other household members = [natural parent, adoptive parent, foster parent, step-parent, parent's partner, parent-in-law, grandparent]  
[DhR = 8...12, 20]  
You've coded ^P[P1].Name as a parent (inc. foster/in-law/step) or grandparent, but *he/she is less than 16 years old. Please check ^P[P1].Name's age.*

**[CHECK DH12] SIGNAL:** IF (relationship to other household members = natural child, adopted child, foster child, stepchild of partner, child-in-law, grandchild)  
AND (child's age >= respondent's age)  
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 DH13] SIGNAL:** IF (relationship to other household members = [natural parent, adoptive parent, foster parent, step-parent, parent's partner, parent-in-law, grandparent]) AND (parent's age =<respondent's age)  
[(DhR = 8...12, 20) AND (P1.DhAge =< P2.DhAge)]  
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 DH14] SIGNAL:** if relationship to other household member is child (inc. foster/in-law/step and there is less than 12 years difference between them.  
"Children (inc. foster/in-law/step) are normally at least 12 years younger than parents/step-parents. Please check the ages you have entered."

**ELSEIF [CHECK DH15] SIGNAL:** if relationship to other household member is parent (inc. foster/in-law/step and there is less than 12 years difference between them.  
"Parents (inc. foster/in-law/step) are normally at least 12 years older than their child/step-child. Please check the ages and relationships you've entered."

**ELSEIF [CHECK DH16] SIGNAL:** if relationship to other household member is grand-child and there is less than 24 years difference between them.  
"Grandchildren are normally at least 24 years younger than grandparents. Please check the ages you have entered."

**ELSEIF [CHECK DH17] SIGNAL:** if relationship to other household member is grand-parent and there is less than 24 years difference between them.  
"Grandparents are normally at least 24 years older than grandchildren. Please check the ages you have entered."

**[CHECK DH18] CHECK:** IF relationship to other household members = natural child, adopted child, foster child AND (number of parents > 2)  
IF [DhR = 3...5] AND [NumParn > 2]  
This suggests that ^P[P1].Name has more than two parents. Please check the relationship codes for ^P[P1]. Name and select which one to alter.

END OF FILTER

IF (Known to have died before this wave= Yes) OR (reason for not living here = deceased)

[Dead = 1 OR DhWhat = 1]

**DHDEAD \***

[^When did [^<correct first name>] die/We understand that [^<correct first name>] has died. May I ask when he/she died?]?

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**[CHECK DH19] SIGNAL:** IF year of death < year of previous interview (wave 1)  
[DhDead < IntYr]  
INTERVIEWER: Individual was recorded as alive at the previous interview in ^HW1.IDoI[person].IntYr. Please check date of death.

**[CHECK DH20] SIGNAL:** CHECK: IF year of death < 1998 [DhDead < 1998]  
INTERVIEWER: Individual was recorded as alive at HSE interview.  
Please check date of death.

*IF year of death = RESPONSE [DhDead = RESPONSE]*

**DHMON \***

(When did [**^<correct first name>**] die?)

INTERVIEWER: Enter the month at this question.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

*IF month of death = RESPONSE [DhMonD = RESPONSE]*

**DHDAY \***

(When did [**^<correct first name>**] die?)

INTERVIEWER: Enter the day at this question.

Range: 1..31

*[CHECK DH21] CHECK: IF approximate date of death is after the date of interview [DateOfDeath > IntDat]*

*INTERVIEWER: This date is in the future (^dhmon ^dhdead)! Please change!*

*[CHECK DH22] SIGNAL: CHECK: IF (date of interview < approximate date of death) ([IntDat < DateOfDeath] INVOLVING (DhMon))*

*INTERVIEWER: From the season specified this date appears to be in the future (^dhmon ^dhdead). Please check and change if necessary.*

*[CHECK DH23] SIGNAL: IF (date of interview < approximate date of death) [IntDat < DateOfDeath]*

*INTERVIEWER: This date is in the future (^dhmon ^dhdead)! Please change!*

END OF FILTER

END OF FILTER

*IF they are an issued core member and Not a Refresh case AND Reason for not living here= deceased [IF SurveyStatus =1 AND Corepartner=1 AND RefreshIV=2 AND DHWhat=1]*

**DHEOL**

INTERVIEWER: You have recorded that [**^Name**] has died. As they are a core member in the existing sample they are eligible for an end of life interview. {**If date of death in hh grid is less than 2 months ago "As they died less than 2 months we will not issue them until after at least 2 months has passed."**} Please

try and arrange the interview with someone (if appropriate) and record the details in the admin block

1. Press 1. And <Enter> to continue

END OF FILTER

END OF LOOP

LOOP FOR EACH PERSON IN HOUSEHOLD: 1 TO 16 WHO HAS MOVED OUT:  
*IF (reason for not living here = living elsewhere - relationship ended, living elsewhere- moved to a nursing/residential home, living elsewhere- other reason) OR reason for not living here = NONRESPONSE*

*[DhWhat = 2 , 3, 4 OR DhWhat = NONRESPONSE]*

**DHLEFTY \***

When did [**^<correct first name>**] move out of this household?

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**DHLEFTM \***

(When did [**^<correct first name>**] move out of this household?)

INTERVIEWER: Enter the month at this question.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

*[CHECK DH24] CHECK: IF date of interview < date moved out of household  
[IntDat < TODATE (DhLeftY, DhLeftM.ORD, 1)]  
INTERVIEWER: This date is in the future (^DhLeftM ^DhLeftY)! Please change!*

*[CHECK DH25] CHECK: IF date of interview < date moved out of household  
[IntDat < TODATE (DhLeftY, DhLeftM.ORD, 1)]  
INTERVIEWER: This date is in the future (^DhLeftM ^DhLeftY)! Please change!*

*IF (Sample status is core member at last interview = Yes) OR (Sample status is partner at last interview = Yes)*

*[ff\_ELSA = 1 OR ff\_Partner = 1]*

*IF reason for not living here = Living elsewhere- relationship ended, Living elsewhere- other reason [DhWhat = 2, 4]*

**DHARFB \***

INTERVIEWER: This is a split household. Create a new household in case selection screen and attempt to find follow-up address for them.

1. Press 1 and <Enter> to continue.

*IF (reason for not living here = living elsewhere - relationship ended, living elsewhere -moved to a nursing/residential home, living elsewhere - other reason) [DhWhat = 2 , 3, 4]*

**DHMOV \* @**

We may need to collect some more details about [*^<correct first name>*] but we will come back to this later.

1. Press 1 and <Enter> to continue.

END OF FILTER

END OF FILTER

END OF FILTER

END OF LOOP

```
IF ff_DhWhat = LivElsM) AND (DhName = Yes)
  AND (ff_InstName = RESPONSE OR ff_InstContact = RESPONSE OR ff_InstAdd1
= RESPONSE
  OR ff_InstAdd2 = RESPONSE OR ff_InstAdd3 = RESPONSE OR ff_InstAdd4 =
RESPONSE
ff_InstAddPC = RESPONSE OR ff_InstTel = RESPONSE) THEN
  HInstC
ENDIF
```

**HInstC**

*"@/We have the following institutional contact details on record for [*^name*]. Are they still correct?"*

*@/@/Institution name: ff\_InstName*  
*@/Institution contact person: ff\_InstContact*  
*@/Institution Address Line 1: ff\_InstAdd1*  
*@/Institution Address Line 2: ff\_InstAdd2*  
*@/Institution Address Line 3: ff\_InstAdd3*  
*@/Institution Address Line 4: ff\_InstAdd4*  
*@/Institution Postcode: ff\_InstAddPC*  
*@/Institution Telephone Number: ff\_InstTel"*

*/ "Whether institutional contact details still correct"*

*: (Correct "Correct - no changes or additions",  
Incorrect "Incorrect - some changes or additions required")*

*IF (HInstC = Incorrect) OR (DhWhat = LivElsM) THEN*

```
|
| IF (HInstC = Incorrect) AND (HInstNam = EMPTY) THEN
| | ProperAddress(ff_InstName,HInstNam)
| | ProperAddress(ff_InstContact,HInstCon)
| | ProperAddress( ff_InstAdd1,HInstAd1)
| | ProperAddress( ff_InstAdd2,HInstAd2)
| | ProperAddress( ff_InstAdd3,HInstAd3)
| | ProperAddress( ff_InstAdd4,HInstAd4)
```

| | *HInstPC := UPPERCASE( ff\_InstAddPC)*  
| | *HInstTel := A ff\_InstTel*

**HInstNam**

"INTERVIEWER: AMEND/ENTER CORRECT INSTITUTION NAME"  
/"New/amended name of institution"  
: STRING[100]

**HInstCon**

"INTERVIEWER: AMEND/ENTER CORRECT INSTITUTION CONTACT PERSON"  
/"New/amended contact person at institution"  
: STRING[100]

**HInstAd1**

"INTERVIEWER: AMEND/ENTER INSTITUTION ADDRESS LINE 1"  
/"New/amended Address line 1 for institution"  
: STRING[100]

**HInstAd2**

"INTERVIEWER: AMEND/ENTER INSTITUTION ADDRESS LINE 2"  
/"New/amended Address line 2 for institution"  
: STRING[100]

**HInstAd3**

"INTERVIEWER: AMEND/ENTER INSTITUTION ADDRESS LINE 3"  
/"New/amended Address line 3 for institution"  
: STRING[100], EMPTY

**HInstAd4**

"INTERVIEWER: AMEND/ENTER INSTITUTION ADDRESS LINE 4"  
/"New/amended Address line 4 for institution"  
: STRING[100], EMPTY

**HInstPC**

"INTERVIEWER: AMEND/ENTER INSTITUTION POSTCODE"  
/"New/amended Postcode for institution"  
: STRING[30]

**HInstTel**

"INTERVIEWER: AMEND/ENTER INSTITUTION TELEPHONE NUMBER"  
/"New/amended Telephone number for institution"  
: STRING[15]

LOOP FOR EACH NEW PERSON IN THE HOUSEHOLD AND FOR EACH  
PERSON WHO HAS RETURNED TO THE HOUSEHOLD

**DHJOINY**

When did [*^<correct first name>*] move [*^BLANK/back*] into this household?  
INTERVIEWER: Enter the year at this question.  
Range: 1900..2050

*[CHECK DH26] SIGNAL: If year moved into household < year of interview  
IF [DhJoinY >= IntYr]  
INTERVIEWER: This date seems to be before the previous interview.  
Please change!*

**DHJOINM**

(When did [**<correct first name>**] move [**BLANK/back**] into this household?)

INTERVIEWER: Enter the month at this question.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (start of year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (end of year)

**[CHECK DH27] CHECK:** *If date of interview < date moved into household*

*[IntDat < TODATE (DhJoinY, DhJoinM.ORD, 1)]*

*INTERVIEWER: This date is in the future (^DhJoinM ^DhJoinY)! Please change!*

**[CHECK DH28] SIGNAL:** *CHECK: If date of previous interview > date moved into household*

*[TODATE (IntYr, IntMth, IntDay) > TODATE (DhJoinY, DhJoinM.ORD, 28)]*

*INTERVIEWER: This date is before the previous interview. Please check!*

END OF LOOP

END OF FILTER

END OF LOOP

**DHELSE**

Does anyone else live here [**BLANK/now**]?

**[INTERVIEWER: IF THE NEW ENTRANT IS A RETURNER WHO WAS LISTED AT THE BEGINNING OF THE INTERVIEW, DON'T ANSWER THIS QUESTION BUT SCROLL BACK TO DHBACK AND CODE THE RELEVANT PERSON NUMBER]**

1 Yes

2 No

[Don't Know and Refusal are not allowed]

**CHTOT**

Computed: Number of children outside household (last wave)

0..97

**CHCOV**

Computed: Number of children covered in the grid/child grid

0..97

*IF (anyone else lives here = Yes) AND ((Number of children outside household (last interview) – Number of children covered in child grid) > 0)*

[DhElse = 1 AND ChTot - ChCov > 0]

**DHELSEC \***

Is this person a child of someone who lives here [^BLANK/or who used to live here]?

1 Yes

2 No

IF whether is child of someone living here = Yes [DhElseC = 1]

**DHELSCY**

INTERVIEWER: Check if it is any of these children recorded at the previous interview.

CODE ONE ONLY.

01 [^<Name of child1>]

02 [^<Name of child2>]

03 [^<Name of child3>]

04 [^<Name of child4>]

05 [^<Name of child5>]

06 [^<Name of child6>]

07 [^<Name of child7>]

08 [^<Name of child8>]

09 [^<Name of child9>]

10 [^<Name of child10>]

11 [^<Name of child11>]

12 [^<Name of child12>]

13 [^<Name of child13>]

14 [^<Name of child14>]

15 [^<Name of child15>]

16 [^<Name of child16>]

17 [^<Name of child17>]

18 [^<Name of child18>]

19 [^<Name of child19>]

20 [^<Name of child20>]

96 No, it is someone else

END OF FILTER

END OF FILTER

IF ((Sample status is core member at last interview = Yes) OR (Sample status is partner at last interview = Yes)) AND (reason for not living here = living elsewhere - moved into a nursing/residential home) [(ff\_ELSA (Wave 1) = 1 OR ff\_Partner (Wave 1) = 1) AND (DhWhat = 3)]

**DHMIPRX**

(You told me that [^name] has moved into a nursing home/residential home). We are interested in understanding the changes that happen in people's lives, so we'd like to invite [^name] to continue to participate in this survey.

Do you think that [^he/she] will be able to answer the questions on [^his/her] own behalf if we were to approach in the future?

1 Yes

2 No

3 Don't know

**[CHECK DH29] SIGNAL:** [IF (DhMiPrx = Yes) OR (DhMiPrx = DK) THEN IF (DMAge < 60) THEN SIGNAL ERROR "INTERVIEWER: This person is also eligible for the timed walk."

*IF whether participant could have institution interview in person = No [DhMiPrx = 2]*

**DHMIPWP**

Is there someone who could answer on [^his/her] behalf in the future?

- 1 Yes
- 2 No

*IF whether someone could do proxy institution interview = Yes [DhMiPWP = 1]*

**DHMIPWH**

INTERVIEWER: Who could answer on behalf of [^Name]?

Priority order is proxy nomination/spouse/partner, next-of-kin, stable address, care home manager.

- 01 [^<Name of Person1>]
- 02 [^<Name of Person2>]
- 03 [^<Name of Person3>]
- 04 [^<Name of Person4>]
- 05 [^<Name of Person5>]
- 06 [^<Name of Person6>]
- 07 [^<Name of Person7>]
- 08 [^<Name of Person8>]
- 09 [^<Name of Person9>]
- 10 [^<Name of Person10>]
- 11 [^<Name of Person11>]
- 12 [^<Name of Person12>]
- 13 [^<Name of Person13>]
- 14 [^<Name of Person14>]
- 15 [^<Name of Person15>]
- 16 [^<Name of Person16>]

97 : Someone else

Range: 1..97

**[CHECK DH30] CHECK:** IF details of proposed proxy institution interview respondent = RESPONSE [DhMiPWh = RESPONSE]

CHECK: If proposed proxy interview respondent = not valid

(DhName = RESPONSE AND DhWhat <> Deceased AND DhDiedC <> Yes AND DhMiPWh <> PNo) OR (DhMiPWh = 97)

This is not a valid code. Please amend.

**[CHECK DH31] CHECK:** IF (QInstMove[myloop].DhMiPWh IN [1..16])

CHECK: If (DHName = Yes) OR (DhWhat = LivElsM) INVOLVING (DhMiPWh)

INTERVIEWER: This is not a valid code! Please change!

END OF FILTER

END OF FILTER

END OF FILTER

**DHRESP**



INTERVIEWER: Code the main person who answered the Household Grid.  
CODE ONE ONLY.

01 [^<Name of Person1>]  
02 [^<Name of Person2>]  
03 [^<Name of Person3>]  
04 [^<Name of Person4>]  
05 [^<Name of Person5>]  
06 [^<Name of Person6>]  
07 [^<Name of Person7>]  
08 [^<Name of Person8>]  
09 [^<Name of Person9>]  
10 [^<Name of Person10>]  
11 [^<Name of Person11>]  
12 [^<Name of Person12>]  
13 [^<Name of Person13>]  
14 [^<Name of Person14>]  
15 [^<Name of Person15>]  
16 [^<Name of Person16>]

97 : Not a Household Member

Range: 1..97

[Don't Know and Refusal are not allowed]

**[Responses are recoded in variable HHRESP]**

#### DHROTH

INTERVIEWER: Did anyone else help to answer the Household Grid?

CODE ALL THAT APPLY.

**[CHECK DH32] CHECK: IF (NotHh IN DhROth) THEN (DhROth.CARDINAL = 1)**  
*Code 95 is exclusive for this question.*

*IF Person who answered HH grid = 97 [DhResp = 97]*

#### DHWARN

INTERVIEWER: The Household Questionnaire should only be answered by a non-household member if all household members eligible for interview are incapacitated.

1. Press <1> and <Enter> to continue.

**[CHECK DH33] CHECK CHECK: IF person's number (person who answered the household grid [1...16, 97])**

*[DhResp 1...16, 97]*

*INTERVIEWER: This is not a valid code! Please change!*

**[CHECK DH34] CHECK: IF person's number (who answered the household grid) = [1 .. 16] [DhResp = 1...16]**

*CHECK: IF (QAHD.P.DhName = Yes) INVOLVING (DhResp)*

*[QAHD.P.DhName = Yes INVOLVING DhResp]*

*INTERVIEWER: This is not a household member! Please change!*

END OF FILTER

LOOP FOR EACH PERSON IN THE HOUSEHOLD WHO HAD A CHILD FROM PREVIOUS INTERVIEW

*IF child's first name from last interview = RESPONSE [Name= RESPONSE ]*

**DHCGN**

Our records show that when we last interviewed [<sup>^</sup>you/<sup>^</sup>[Name]], [<sup>^</sup>you/he/she] had a child called [<sup>^</sup><child's first name>], [<sup>^</sup>whose date of birth is [<sup>^</sup>date of birth from last interview] /who was aged [<sup>^</sup><age from last interview>]]. Are these details correct?

- 1 Yes - Details correct
- 2 No - Some details need changing
- 3 Yes - Child has since died
- 4 No - Respondent never had this child

ELSE

**DHCH**

Do you have any [<sup>^</sup>BLANK/other] children who do not live here [<sup>^</sup>BLANK/ and who have not been mentioned already]?

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

**Please do not include any children that have already been mentioned.**

- 1 Yes
- 2 No

*[SOFT CHECK]: IF DHCH =1*

*INTERVIEWER: Have these children already been mentioned? If so do not include*

*[CHECK DH35] CHECK: CHECK: If number of living children = 0 AND DHCH=1 [DhNCh = 0]*

*Please enter the number of children outside the household or change DhCh to 'No' (code 2)*

*IF whether has children not living here = Yes [DhCh = 1]*

**DHNCH**

In total, how many [<sup>^</sup>BLANK/other] living children do you have [<sup>^</sup>BLANK/ and who have not been mentioned already]?

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

Range: 0..20

*[SOFT CHECK] IF DHNCH > Number children in HH grid + Number children outside HH (last wave)?*

*INTERVIEWER: This is higher than the number of children mentioned so far. Please check.*

END OF FILTER

END OF FILTER

END OF LOOP

LOOP FOR EACH CHILD OF HOUSEHOLD MEMBER

*IF ((child's details check= Correct, Change some) AND (whether have children who do not live here <> No) )*

*[DhCgN = 1, 2 AND DhCh <> 2]*

*IF (Child's name = RESPONSE) AND (child's details check<> Correct)*

*[Name = RESPONSE AND DhCgN <> 1]*

**DHNC**

INTERVIEWER: ASK OR CODE: Is the first name ([<sup>^</sup><child's first name from last

interview>]) correct?

- 1 Yes
- 2 No

END OF FILTER

*IF (child's name check = No) OR (Child's name <> RESPONSE)  
[DhNC = 2 OR Name <> RESPONSE]*

**DHCNA**

What is the first name of [^this/the oldest/the next] child?

String: 20

*IF (Sex from last interview = RESPONSE) AND (child's details check <> Correct)  
[Sex(Last int) = RESPONSE AND DhCgN <> 1]*

**DHSEXC**

ASK OR CODE: Can I just check, is [^<first name of child>] [^male/female]?

- 1 Yes
- 2 No

END OF FILTER

*IF (child's sex check = No) OR (Sex from last interview = NA, DK, Ref, new  
partner)  
[DHSexC = 2 OR ff\_Sex = 9991, 9998, 9999, empty]*

**DHCS**

INTERVIEWER: Code or ask [^<first name of child>]'s sex.

- 1 Male
- 2 Female

*IF (DoB from last interview = RESPONSE) AND (child's details check <> Corr)  
[ff\_DoB (Last int) = RESPONSE AND DhCgN <> 1]*

**DHDOBC**

Can I just check, [^is/was] [^<first name of child>]'s date of birth [^<date of birth  
from last interview >]?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF (child's date of birth check = No) OR (DoB from last interview = NA, DK, Ref,  
new partner)  
[DHDoBC = 2 OR ff\_DoB (Last int) = 9991, 9998, 9999, empty]*

**DHCDB**

What is [^<first name of child>]'s date of birth?

*IF child's date of birth = NONRESPONSE [DhCDB = NONRESPONSE]*

*[CHECK DH36] SIGNAL: If child's date of birth < parent's date of birth  
IF [DhCDB < DMDob]  
INTERVIEWER: Child appears to be older than parent. Please check.*

Child : ^dhcna - ^DhCDB . Parent : ^dmname[dhpa] - ^dmdob[dhpa]

**[CHECK DH37] SIGNAL:** IF date of interview < child's date of birth [IntDat >= DhCDB]

INTERVIEWER: This date is in the future (^DhCDB)! Please change!

**[CHECK DH38] SIGNAL:** IF child's date of birth = person's date of birth IF [DhCDB = DMDob]

EDIT: 'Children outside HH' ^Dhcna has the same DoB (^DhCDB) as Person ^edloop (^dmname[edloop]) in the Grid."

### DHCAG

What was [**<first name of child>**]'s age last birthday?

Range: 0..120

LOOP FOR EACH CHILD OUT OF THE HOUSEHOLD FOR EACH HOUSEHOLD MEMBER STILL IN HOUSEHOLD

IF *child's relationship to household member from last interview = RESPONSE*  
[ff\_CRel (Last int) = [0..22]]

### DHRC

And, is [**<first name of child>**] [**^your/^name's**] [**^husband/wife/partner etc.**]?

1 Yes

2 No

END OF FILTER

IF (check relationship to HH member = No) OR (child's relationship to household member from last interview = NA, DK, Ref, new partner)  
[DHRC = 2 OR ff\_CRel (Last int) =9991,9998,9999,empty]

### DHCR

SHOWCARD A1

What is [**<first name of child>**]'s relationship to [**^you/ ^name**]?

Please choose a number from this card.

01 Husband/Wife

02 Partner/cohabitee

03 Natural son/daughter

04 Adopted son/daughter

05 Foster son/daughter

06 Step son/daughter/child of partner

07 Son/daughter-in-law

08 Natural parent

09 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  
 [Don't Know and Refusal are not allowed]

Descriptive	Variable	Archive
Relationship of 1 <sup>st</sup> child to Person 1-16 in the Household	DHCR01-16	DHCR01-16
Relationship of 2 <sup>nd</sup> child to Person 1-16 in the Household	DHCR17-32	DHCR17-32
Relationship of 3 <sup>rd</sup> child to Person 1-16 in the Household	DHCR33-48	DHCR33-48
Relationship of 4 <sup>th</sup> child to Person 1-16 in the Household	DHCR49-64	DHCR49-64
Relationship of 5 <sup>th</sup> child to Person 1-16 in the Household	DHCR65-80	DHCR65-80
Relationship of 6 <sup>th</sup> child to Person 1-16 in the Household	DHCR81-96	DHCR81-96
Relationship of 7 <sup>th</sup> child to Person 1-16 in the Household	DHCR97-112	DHCR97-112
Relationship of 8 <sup>th</sup> child to Person 1-16 in the Household	DHCR113-128	DHCR113-128
Relationship of 9 <sup>th</sup> child to Person 1-16 in the Household	DHCR129-144	DHCR129-144
Relationship of 10 <sup>th</sup> child to Person 1-16 in the Household	DHCR145-160	DHCR145-160
Relationship of 11 <sup>th</sup> child to Person 1-16 in the Household	DHCR161-176	DHCR161-176
Relationship of 12 <sup>th</sup> child to Person 1-16 in the Household	DHCR177-192	DHCR177-192
Relationship of 13 <sup>th</sup> child to Person 1-16 in the Household	DHCR193-208	DHCR193-208
Relationship of 14 <sup>th</sup> child to Person 1-16 in the Household	DHCR209-224	DHCR209-224
Relationship of 15 <sup>th</sup> child to Person 1-16 in the Household	DHCR225-240	DHCR225-240
Relationship of 16 <sup>th</sup> child to Person 1-16 in the Household	DHCR241-256	DHCR241-256

**[CHECK DH39] SIGNAL:** IF (relationship to child = natural child, adopted child, foster child, step child)

[DHCR <> 3...6]

EDIT: 'Children outside HH' DhCr is not codes 3-6 (Child -Natural / adopted / foster / Step). Please check!

**[CHECK DH40] CHECK:** IF ((child's date of birth = No) OR (CRel[chloop] <> RESPONSE))

[(DHRC[chloop] = No) OR (CRel[chloop] <> RESPONSE) ]

CHECK: If DhCr = Self [DhCr[chloop] = Self]

This is not a valid code - please change.

**[CHECK DH41] SIGNAL:** IF (((idx < PP) AND (child's sex= RESPONSE))

AND (child's age at last birthday = RESPONSE) AND (child's sex=

RESPONSE) AND (child's age at last birthday = RESPONSE)

[idx < PP AND C[PP].DhCS = RESPONSE AND C[PP].DhCAg =

RESPONSE AND C.DhCS = RESPONSE AND C.DhCAg = RESPONSE]

CHECK: IF ((C[idx]. child's sex= C[PP]. child's sex) AND (child's age at last birthday g = C[PP]. child's age at last birthday)

[ C.DhCS = C[PP].DhCS AND C.DhCAg = C[PP].DhCAg]

INTERVIEWER: This person's details are the same as ^C[idx].DhCNa's.

Are you sure it is a different person?

**[CHECK DH42] SIGNAL:** IF (C[PP].DhCR[idx] = RESPONSE) THEN IF (C[PP].DhCR[idx] = Spouse) AND (QAHD.P[idx].DhSex = RESPONSE) AND (C[PP].DhCS = RESPONSE) THEN SIGNAL IF (QAHD.P[idx].DhSex = C[PP].DhCS) INVOLVING (C[PP].DhCR[idx], C[PP].DhRC[idx])

*SOFT CHECK: IF Married partners are of same sex [P1.DhSex = P2.DhSex]  
As of 29 March 2014 same sex couples can marry in England and Wales.  
Please check if the respondents in this couple are married or are in a civil  
partnership, and code appropriately.*

**[CHECK DH43] SIGNAL:** *IF (relationship to child = natural parent, adoptive  
parent, foster parent, stepparent, parent in law, grandparent)  
AND (person's age last birthday < 15) OR (age at last birthday = under  
16)  
IF [(DHCR = 8...12, 20) AND (DhAge < 15 OR DhEAg = LE16)]  
You've coded ^C[PP].DhCNa as a parent (inc. foster/in-law/step) or  
grandparent, but he/she is less than 16 years old. Please check  
^C[PP].DhCNa's age.*

**[CHECK DH44] SIGNAL:** *IF (relationship to child = natural child, adopted  
child, foster child, step child of partner, child-n-law, grandchild) AND age is  
older than child's age  
if [(DHCR = 3...7, 19) AND (DhCAg > DhAge )  
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 DH45] SIGNAL:** *IF (relationship to child = natural parent, adoptive  
parent, foster parent, step-parent, parent's partner, parent-in-law,  
grandparent) AND (child's age > person's age )  
IF [(DhR = 8...12, 20) AND (DhCAg > DhAge)]  
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 DH46] CHECK:** *IF relationship to child = natural child, adopted child,  
foster child AND number of parents > 2) [DhR = 3...5] [NumParn > 2]  
This suggests that ^C[PP].DhCNa has more than two parents. Please check  
the relationship codes for ^C[PP].DhCNa and select which one to alter.*

**[CHECK DH47] CHECK:** *IF (relationship to child = spouse / partner /  
cohabitee)  
IF [DHCR = 1, 2]  
^C[PP].DhCNa has more than one spouse /cohabitee. Establish who is  
principal partner.*

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

END OF LOOP

*IF Total Eligible for interview after the household grid = 1 [EligBT = 1]*

**DHANYPX**

INTERVIEWER: [^name] [^is/are] eligible for interview. [^Does he/she/Do either/any of them] need a proxy interview?

- 1 Yes
- 2 No

*IF (Any respondents need a proxy = Yes) AND (Total eligible for interview after the household grid = 2)*

*[DhAnyPx = 1 AND EligBT = 2]*

**DHPROXY**

INTERVIEWER: Code person numbers of any eligible respondents incapable of interview.

NOTE: This will generate a Proxy interview.

- 01 [^Person number 1]
- 02 [^Person number 2]
- 03 [^Person number 3]
- 04 [^Person number 4]
- 05 [^Person number 5]
- 06 [^Person number 6]
- 07 [^Person number 7]
- 08 [^Person number 8]
- 09 [^Person number 9]
- 10 [^Person number 10]
- 11 [^Person number 11]
- 12 [^Person number 12]
- 13 [^Person number 13]
- 14 [^Person number 14]
- 15 [^Person number 15]
- 16 [^Person number 16]

**[code maximum 16 out of 16 possible responses]**

**[CHECK DH48] CHECK:**

*IF (person's number for proxy interview = RESPONSE) AND (myloop = DhProxy)*

*[DhProxy = RESPONSE AND myloop = DhProxy]*

*CHECK: If eligible for interview after grid <> Yes [EligB <> 1]*

*^myloop is not a valid person number! please change!*

**DHPXWHY**

INTERVIEWER: Why does [^<name of eligible respondent incapable of interview>] need a proxy interview?

- 1 "Mentally incapacitated/impaired",
- 2 "Physically incapacitated",
- 3 "In hospital",
- 4 "Away or no contact with respondent",
- 5 "Refused personal interview",
- 6 "Language difficulties",
- 7 "Other reason"

**[CHECK DH49] SIGNAL: IF reason for proxy interview = language difficulties**

*[DHPxWhy[myloop] = Lang]*

*CHECK: ERROR INVOLVING (DHPxWhy[myloop])*

*INTERVIEWER: Please do not do a proxy interview because the ELSA sample member does not speak English well enough to do their own interview. Non-English speakers are not eligible for ELSA.*



*[CHECK DH50] SIGNAL: ELSE IF (DHAnyPx = Yes AND EligPt = 1 AND EligB[myloop] = Yes) AND QAHD.P[myloop].DhName = Yes)  
CHECK: If (DHPxWhy[myloop] = MenInc)  
Please ensure you have obtained signed consent from the proxy / consultee to carry out this interview.*

*IF reason for proxy = other [DhPxWhy = 7]*

**DHPXOTH**

INTERVIEWER: Please specify why the respondent requires a proxy interview."  
STRING[40]

END OF FILTER

*IF reason for proxy = Mentally incapacitated/impaired [DhPxWhy = 1]*

**DHPXM**

INTERVIEWER: Please remember to get signed consent from the proxy/consultee on whether the respondent would be willing to participate in this interview and for to agreement do the interview on the respondent's behalf.

END OF FILTER

END OF FILTER

END OF FILTER

LOOP TO WORK OUT WHETHER TO ASK IA MODULE IN INDIVIDUAL INTERVIEW

**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**] each keep [**^your**] finances totally separate from each other?

1 Yes

2 No

END OF LOOP

*IF Total Eligible for interview after DHPROXY= 2 [EligCT = 2]*

**DHNOW \***

INTERVIEWER: Are you about to begin a concurrent interview with [**^name A and ^name B**]? The order in which respondents will appear in the session would be:

[**^<name of person A> and ^<name of person B>**]

[**^BLANK/INTERVIEWER: if respondents have separate finances - be sure they are willing to answer questions about their finances in front of each other before them interviewing together**]

1 Yes

2 No

[Don't Know and Refusal are not allowed]

*IF INTERVIEWER: Are you about to begin concurrent interview = Yes [DhNow = 1]*

**DHSURY \***

INTERVIEWER: Code 1 here to confirm that Individual Session one will be a



concurrent interview with [^name A and ^name B] The order in which respondents will appear in the session will be : [^<name of person A> and ^<name of person B>] Note : This cannot then be changed.

1 Correct

2 Not correct

[Don't Know and Refusal are not allowed]

*[CHECK DH51] CHECK: CHECK: IF (order of respondents in concurrent interview = Not correct) [DhSurY = Notc]  
INTERVIEWER: please change DhNow.*

*[CHECK DH52] CHECK: IF (order in which respondents will appear in the session = Correct) OR (order in which respondents will appear in the session = No) AND (order in which respondents will appear in the session = response) AND (Copy of DHNow =Empty)*

*[(DhSurY = Correct OR DhNow = No) AND DhNow = RESPONSE AND DhNowX = EMPTY]*

*CHECK: If DhNow <> DhNowx [DhNow <> DhNowx]*

*INTERVIEWER: you cannot change your answer to DHNow! Please change back to ^dhnowx.*

END OF FILTER

END OF FILTER

LOOP FOR EACH RESPONDENT ELIGIBLE TO INTERVIEW

*IF INTERVIEWER: Are you about to begin concurrent interview = No [DhNow =2 ]*

*IF whether keep finances separate = No [DhlaSep = 2]*

**DHIAWHO \***

INTERVIEWER: 'I will only need to ask one of you the questions about your finances. Which of you would be most able to answer these questions?'

CODE ONE ONLY.

1 [^<Name of person A>]

2 [^<Name of person B>]

[Don't Know and Refusal are not allowed]

END OF FILTER

END OF FILTER

END OF LOOP

*IF Total eligible for interview after DHPROXY > 1 [EligCT> 1]*

**DHHOU\***

INTERVIEWER: Some questions in the interview are about your household's housing and housing finances. I will only need to ask these to one person.

[^BLANK/Last time we interviewed you, [^<name of person>] answered these questions.] Which of you would be the most able to answer questions about housing [^BLANK/this time]?

CODE ONE ONLY.

Range: 1..97

**[CHECK DH53] CHECK:** IF proposed respondent for HO = RESPONSE  
[DHHou = RESPONSE]  
**CHECK:** If eligible for interview after DHPProxy <> Yes [EligC <> 1]  
**INTERVIEWER:** This is not a valid person number! Please change!

**[CHECK DH54] CHECK:** CHECK: If (proposed respondent for HO = DK) OR  
(proposed respondent for HO = RF) [DHHou = DK OR DHHou = RF]  
**INTERVIEWER:** This is not a valid answer! Please change!

END OF FILTER

## 2 - INDIVIDUAL DEMOGRAPHICS MODULE (ID)

**Note:** Refreshment indicator (*Refresh*) is no longer at the household level but at the individual level and the variable is called *RefreshIV*. The derivation for *RefreshIV* is as follows:

*If Cohort<10, RefreshIV = No*  
*If Cohort=10 and IVout<30, RefreshIV = NO*  
*If Cohort=10 and IVout=>30, RefreshIV = YES*  
*If Cohort=11, RefreshIV = Yes*

### DIINTA \*

I'd like to ask a few (more) questions about [^you /[^Name]] and [^your /his /her] family.  
1 Press <1> and <Enter> to continue.

If sample type = refreshment or if new partner  
[IF (*RefreshIV = Yes*) OR (QHD.EligA[AllocP] <> Yes)]

### DIDOB

Can I just check that your date of birth is [^<date of birth>]?  
1 Correct  
2 Incorrect

*IF whether date of birth correct = Incorrect [DiDob = 2]*

### DIDBN

What is your date of birth?

**[Year of birth from *DHDOB* and *DIDBN* are combined in derived variable *INDOBYR*. If *DIDBN* was answered then *INDOBYR=DIDBN*, ELSE *IndobyR=DHDOB*. Respondents aged 90 or over at the time of interview are recoded to "-7".]**

END OF FILTER

*IF date of birth = DK [DiDBN = DK]*

### DIAG @

What was your age last birthday?  
Range: 0..120

**[Ages from *DHAGE* and *DIAG* are combined in derived variable *INDAGE*. If *DIAG* was answered then *INDAGE=DIAG*, ELSE *INDAGE=DHAGE*. Both *DHAGE* and *DIAG* are computed from the difference between the date of interview, *INTDAT*, and the date of birth from *DHDOB* or *DIDBN* respectively. *INDAGE* is archived under *SL*. *INDAGER* – which recodes ages 90 or over to "-7" to avoid disclosure – is archived under *EUL*.]**

END OF FILTER

END OF FILTER

### DIINT \*\*

Who is completing the proxy for [^Name]?

01 [^<Name of Person1>]

02 [^<Name of Person2>]

03 [^<Name of Person3>  
04 [^<Name of Person4>  
05 [^<Name of Person5>  
06 [^<Name of Person6>  
07 [^<Name of Person7>  
08 [^<Name of Person8>  
09 [^<Name of Person9>  
10 [^<Name of Person10>  
11 [^<Name of Person11>  
12 [^<Name of Person12>  
13 [^<Name of Person13>  
14 [^<Name of Person14>  
15 [^<Name of Person15>  
16 [^<Name of Person16>  
97 Not a household member

*IF (Name of proxy respondent <> Member of household) [Dilnt <> (1 - 16)]*

**DIPRE \*\***

SHOW CARD A1

(Can I just check,) what is your relationship to [^him / her]?

01 Husband / Wife  
02 Partner / cohabitee  
03 Natural son / daughter  
04 Adopted son / daughter  
05 Foster son /daughter  
06 Step son / daughter / child of partner  
07 Son / daughter-in-law  
08 Natural parent  
09 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 (THIS CODE NOT USED)  
[Don't Know and Refusal are not allowed]

**[CHECK ID1] CHECK:** IF Relationship to proxy = Self [DiPRe = Self]  
This is not a valid code - please change.

END OF FILTER

If sample type = refreshment or if new partner

[IF (RefreshIV = Yes) OR (QHD.EligA[AllocP] <> Yes)]

**DISEXC \***

ASK OR CODE: Can I just check that [^you are / ^Name] is [^male / female]?

1 Yes

2 No

*IF whether sex correct = No [DiSexC = 2]*

**DISEX \***

INTERVIEWER: Code [^Name's] sex.

1 Male

2 Female

END OF FILTER

END OF FILTER

**DIMAR \***

**(archived under SL; recoded variable DIMARR – which collapses marriage and civil partnership categories – is archived under EUL)**

**SHOWCARD B1**

What is [^your / ^Name's] current legal marital status?

- 1 Single, that is never married and never registered in a same-sex Civil Partnership
- 2 Married, first and only marriage
- 3 A civil partner in a registered same-sex Civil Partnership
- 4 Remarried, second or later marriage
- 5 Separated, but still legally married
- 6 Divorced
- 7 Widowed
- 8 Spontaneous only – Separated but still legally in a same-sex- Civil Partnership his/her civil partner
- 9 Spontaneous only - Formerly in a same-sex Civil Partnership which is now legally dissolved
- 10 Spontaneous only - A surviving civil partner from a same-sex Civil Partnership
- 11 Spontaneous only - A civil partner in a registered same-sex Civil Partnership and has been married or in another same-sex Civil Partnership before.

*[CHECK ID2] SIGNAL: IF marital status is different from “Married, first and only marriage”, “Remarried, second or later marriage”*

*IF [DiMar <> 2 OR 3]*

*INTERVIEWER: Are you sure? Respondent is recorded in HH Grid as having a husband / wife*

*IF respondent is in an institution, e.g. care home*

**MIREL\***

SHOW CARD A1

Can I just check, what is your relationship to [^you/[^name]]?

01 Husband / Wife

02 Partner / cohabitee

03 Natural son / daughter

04 Adopted son / daughter

05 Foster son /daughter

06 Step son / daughter / child of partner

07 Son / daughter-in-law

08 Natural parent

09 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 (THIS CODE NOT USED)

[Don't Know and Refusal are not allowed]

*IF (relationship of informant to respondent <> Spouse, Partner) AND (whether has a partner <> Yes)*

*[MIREL <> 1,2 AND Dimar = 1,5,6,7,8,9,10,11]*

**MISPOU\***

INTERVIEWER: ASK OR CODE.

[^Do you/Does [^Name]] have a partner?

- 1 Yes
- 2 No

END OF FILTER

*IF (relationship of informant to respondent = Spouse, Partner) OR (whether has a partner = yes)*

*[(MIREL = 1, 2) OR (MISPOU = 1) OR (PMAR = 1)]*

**MILIVE\***

INTERVIEWER: Ask or code.

Where does their spouse or partner live?

- 1 In own home
- 2 Same care home as spouse/partner
- 3 Different care home to spouse/partner

**MISINT\***

INTERVIEWER CODE:

Has spouse/partner already had an ELSA interview in this wave?/ "Has partner of respondent in institution been interviewed in current wave"

- 1 Yes
- 2 No

END OF FILTER

*IF whether IA block should be addressed to this person number = Yes [IAskIA[PN0] = Yes]*

**MIFIN\***

INTERVIEWER: Ask or code.

Does this couple keep their finances totally separate?

Please check that answer is consistent with partner's.

Whether keep their finances totally separate

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

**DIPREAM \***

The next set of questions are about your family such as number of siblings and some details about your parents.

Press 1 and <Enter> to continue.

*IF (children in or outside of household in household grid = Yes) AND (grandchild or great-grandchild in household grid <> Yes) AND (any living grandchildren or great-grandchildren at last interview = No, NA, DK, Ref, new partner) OR proxy interview this wave = Yes*

*[IF ((IChInHH = Yes) OR (IChOutHH = Yes)) AND (IGCinHH <> Yes) AND ((ff\_DiGran = 2, 9991, 9998, 9999, empty) OR IAskPx=Yes)]*

**DIGRAN \***

*[^Do you / Does [^Name]] have any living grandchildren or great-grandchildren?*

1 Yes

2 No

END OF FILTER

*IF (any living grandchildren or great-grandchildren at last interview = Yes) AND (not a proxy interview)*

*[(ff\_DiGran = Yes) AND NOT (IAskPx=Yes)]*

**DIGNMYC**

Last time we interviewed you in [*^<date of last interview>*], you told us that you had [*^<number of grandchildren or great-grandchildren reported at last interview>*] living grandchildren or great-grandchildren. Is this still the case?

1 Yes

2 No

END OF FILTER

*IF (grandchild or great-grandchild in household grid = Yes AND any living grandchildren or great-grandchildren at last interview = No, NA, DK, Ref, new partner AND non-proxy interview this wave) OR (whether has any grandchildren or great-grandchildren newly reported this wave = Yes) OR (whether same number of living grandchildren or great-grandchildren as last interview = No)*

*[(IGCInHH = Yes AND ff\_DiGran = 2, 9991, 9998, 9999, empty AND IAskPx<>Yes) OR (DiGran = Yes) OR (DiGnMyC = No)]*

**DIGNMY \***

How many living grandchildren or great-grandchildren [*^do you / does [^Name]*] have?

Range: 0..97

*PROGRAMMING NOTE: If DiGnMYC = Yes compute DIGNMY = number of grandchildren (Last Int)*

*[CHECK ID3] SIGNAL: IF number of living grandchildren or great-grandchildren > 20 IF [DiGnMy > 20]*

*INTERVIEWER: ^dignmy seems high. Are you sure?*

*[CHECK ID4] SIGNAL: IF number of living grandchildren or great-grandchildren < Number of living grandchildren or great-grandchildren (last int)*

[DiGnMy < ff\_dignmy AND ff\_dignmy = [0..97]]

INTERVIEWER: Please check, that is fewer living grandchildren and great-grandchildren now than they did when we last interviewed them.

**[CHECK ID5] SIGNAL:** IF (last time interviewed living grandchildren or great-grandchildren = No) AND (*number of living grandchildren or great-grandchildren* > 0) (DiGnMyC = No) AND (DiGnMy = RESPONSE)

CHECK: IF (DiGnMy = ff\_dignmy)

INTERVIEWER: You recorded that the number of grandchildren has changed but have entered the same number.

END OF FILTER

*IF have child(ren) aged 16 or over living outside the household [ChOutHH = 1]*

**DIGPRXA**

**SHOWCARD B2**

About how long would it take you to get to where your nearest son/daughter (aged 16 or over) lives? Think of the time it usually takes door to door.

1. Less than fifteen minutes
2. Between 15 and 30 minutes
3. Between 30 minutes and one hour
4. Between 1 and 2 hours
5. More than 2 hours
6. SPONTANEOUS Lives/works abroad
7. SPONTANEOUS Live in same household

END OF FILTER

*IF has grandchild(ren) [DIGNMy > 0]*

**DIGPRXB**

**SHOWCARD B2**

About how long would it take you to get to where your nearest grandchild lives? Think of the time it usually takes door to door.

1. Less than fifteen minutes
2. Between 15 and 30 minutes
3. Between 30 minutes and one hour
4. Between 1 and 2 hours
5. More than 2 hours
6. SPONTANEOUS Lives/works abroad
7. SPONTANEOUS Live in same household

END OF FILTER

*IF number of living brothers or sisters at last interview = 1..97*

*[(ff\_disib = [1..97]) AND IF NOT(IAskPx=Yes)]*

**DISIBC \***

Last time we interviewed [*^you / ^Name*] in [*^<date of last interview>*], [*^you / he / she*] told us that [*^you / he / she*] had [*^<number of brothers or sisters reported at last interview>*] living brothers or sisters. [*^Do you / Does he / Does she*] still have [*^<number of brothers or sisters reported at last interview>*] living brothers or sisters?

- 1 Yes
- 2 No



END OF FILTER

IF (whether same number of living brothers or sisters as last interview = No) OR  
(number of living brothers or sisters at last interview = NA, DK, REF, new partner)  
[IF (DiSibC = No OR ff\_DiSib = 9991, 9998, 9999, empty) OR (IAskPx=Yes)]

**DISIB \***

How many living brothers or sisters [^do you / does [^Name]] have?  
IF ASKED: Foster / adoptive / step-brothers / sisters can be included.  
Range: 0..97

**[CHECK ID7] SIGNAL:** IF Number of living brothers or sisters > 12 [DiSib > 12]  
INTERVIEWER: ^Number of living brothers or sisters seems high. Are you sure?

**[CHECK ID6] SIGNAL:** CHECK: IF (number of living brothers or sisters > number of  
living brothers or sisters (LAST INT))

IF [DiSib > ff\_DiSib]

INTERVIEWER: Please check that is **more** living brothers and sisters than they had  
last time they were interviewed.

**[CHECK ID7] SIGNAL:** IF number of living brothers and sisters has changed AND  
the recorded number is the same as that recorded at last interview

IF [DiSib = ff\_DiSib] AND disibc=1.

INTERVIEWER: You recorded that the number of brothers and sisters has changed  
but have entered the same number.

END OF FILTER

IF (natural mother still alive at last interview = Yes, NA, DK, Ref, new partner) AND  
(natural mother in household grid <> Yes)  
[(ff\_DinMa = 1, 9991, 9998, 9999, empty AND IMainHH <> Yes)]

**DINMA \***

Is [^your / [^Name]'s] natural mother still alive?  
1 Yes  
2 No

IF natural mother alive = Yes [DINMA = 1]

**DIANM \***

How old is [^your / [^Name]'s] natural mother?  
Range: 16..120

**[CHECK ID8] SIGNAL:** IF Age of natural mother <= 50 [DiANM <= 50]

INTERVIEWER: The respondents' mother seems young (^dianm).  
Please check.

**[CHECK ID9] SIGNAL:** IF 15 or less years difference between the age of the  
natural mother and that of the respondent

CHECK: IF (Age of natural mother - Respondent Age) <= 15 [DiANM - IAgeOf <= 15]

INTERVIEWER: The respondents' mothers age seems low (^dianm) relative to the  
age of the respondent (^iageof). Please check.

**[CHECK ID10] SIGNAL:** IF Age of natural mother < Respondent Age

IF [DiANM < IAgeOf]  
INTERVIEWER: This is younger than ^iname now!  
Please check!

END OF FILTER

END OF FILTER

IF (natural mother in household grid <> Yes) AND (natural mother's date of birth not given at last interview) AND ((natural mother still alive at last interview = No) OR (natural mother still alive = No))  
[(IMainHH <> Yes) AND (FF\_DiMDOB\_ = 9991, 9998, 9999, empty) AND ((ff\_DinMa = 2) OR (DinMA = No))]

**DIMDOB \***

What was [^your / [^Name's]] natural mother's date of birth?  
DATATYPE

**[CHECK ID11] SIGNAL:** IF difference between mother's age and participants' age is 15 years or less  
CHECK: IF [(AGE(DiMDOB,SIIntDat) - IAgeOf)< 15]  
Are you sure this is the correct date of birth? [^IName] is aged [age] so would have been born before [^his/her] mother was 15.

END OF FILTER

IF natural mother in household grid = Yes [IMainHH = 1] AND whether natural mother ever been told by a doctor that she has diabetes not answered at last interview (FF\_DiMADI = 9991, 9998, 9999, empty)

**DIMADI \***

Has [^your / [^Name]'s] natural mother ever been told by a doctor that she has diabetes?  
1 Yes  
2 No

END OF FILTER

IF natural mother not in household grid AND age of natural mother when she died not given at last interview AND mother still alive at last interview=no OR natural mother still alive = No  
IF (IMainHH <> Yes) AND (ff\_DiMaD = 9991, 9998, 9999, empty) ) AND ((ff\_DinMaD = No) OR (DinMA = No)) THEN

**DIMAD \***

How old was [^your / [^Name]'s] natural mother when she died?  
INTERVIEWER: If the respondent doesn't know the exact age, ask for an estimate.  
Range: 0..120

**[CHECK ID12] SIGNAL:** IF Age at which natural mother died < 16 [DiMaD < 16]  
INTERVIEWER: Are you sure they were this age when they died?

**[CHECK ID13] SIGNAL:** IF (DiMaD < 12)  
INTERVIEWER: The age at which the respondent's mother died is too young. Please change."

END OF FILTER

*IF year mother died not given at last interview AND ((natural mother still alive at last interview = No) OR (natural mother still alive = No)) AND (natural mother's date of birth = don't know or refusal) AND (natural mother's date of birth not given at last interview)*

[IF (FF\_Dimdyr = 9991, 9998, 9999, empty) AND ((DiNMA = No) OR (ff\_DinMa = No)) AND IF (DiMDOB = DK OR DiMDOB = REF) AND (FF\_DimDOB\_ =9991, 9998, 9999, empty) THEN]

**DIMDYR \***

What year did [^your / ^Name]'s mother die?

INTERVIEWER: If the respondent doesn't know the exact year, ask for an estimate.

RANGE: 1920..2015

[CHECK ID14] SIGNAL: IF (DiMdYr = RESPONSE)

CHECK: IF DiMdYr < IDoB.Year

This is before ^Name was born. Please check.

END OF FILTER

*IF natural mother still alive = No [DiNMA = 2]*

**DICDNM \***

**SHOWCARD B3**

Did [^your / ^Name]'s natural mother 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

END OF FILTER

*If age at which natural mother finished full-time education not given at last interview*

[IF (FF\_DiMaEdu = 9991, 9998, 9999, empty) THEN]

**DIMAEDU \***

At what age did [^your / ^Name]'s natural mother finish her continuous full-time education at school or college?

CODE ONE ONLY.

- 1 Never went to school
- 2 14 or under
- 3 At 15
- 4 At 16
- 5 At 17
- 6 At 18
- 7 19 or over

END OF FILTER

IF (natural father still alive at last interview = Yes, NA, DK, Ref, new partner) AND  
| (natural father in household grid <> Yes)  
| [(ff\_DinFa = 1, 9991, 9998, 9999, empty) AND IPainHH <> Yes)]

**DINFA \***

Is [^your / [^Name]'s] natural father still alive?

- 1 Yes
- 2 No

IF natural father alive = Yes [DiNFA = 1]

**DIANF \***

How old is [^your / [^Name]'s] natural father?

Range: 16..120

[CHECK ID15] SIGNAL: IF Age of natural father <= 50 [DiANF <= 50]  
INTERVIEWER: The respondents' father seems young (^dianf). Please check.

[CHECK ID16] SIGNAL: IF (Age of natural father – Respondent Age) <= 15  
[DiANF - IAgeOf <= 15]

INTERVIEWER: The respondents' fathers age seems low (^dianf) relative to the age  
of the respondent (^iageof). Please check.

[CHECK ID17] SIGNAL: IF (Age of natural father < Respondent Age)  
IF [DiANF < IAgeOf]

INTERVIEWER: This is younger than ^iname now!  
Please check!

END OF FILTER

END OF FILTER

IF (natural father in household grid <> Yes) AND ((natural father still alive last interview  
= No) OR (natural father still alive = No)  
| IF (IPainHH <> Yes) AND (ff\_DiFDOB = 9991, 9998, 9999, empty) AND  
| ((ff\_DinFa = No) OR (DiNFA = No)))

**DIFDOB\***

What was [^your / [^Name]'s] natural father's date of birth?

DATETYPE

[CHECK ID18] SIGNAL: IF age difference between natural father and respondent is  
less than 15 years  
CHECK: IF (AGE(DiFDOB,SIIntDat) - IAgeOf < 15)  
Are you sure this is the correct date of birth? ^IName is aged ^IAgeOf so would have  
been born before ^dhisher father was 15.

END OF FILTER

IF natural father in household grid <> Yes AND whether natural father ever told by a  
| doctor that he has diabetes not given at last interview]  
| IF (IPainHH <> Yes) AND (ff\_DiFADI = 9991, 9998, 9999, empty)]

**DIFADI \***

Was [^your / [^Name]'s] natural father ever told by a doctor that he has diabetes?

1 Yes  
2 No

END OF FILTER

*IF natural father in household grid AND age natural father died was not given in last interview AND natural father still alive at last interview = No and natural father still alive = No]*

*[IF (IPainHH <> Yes) AND (ff\_DiFaD = 9991, 9998, 9999, empty) AND ((ff\_DinFa = No) OR (DiNFA = No))]*

**DIFAD \***

How old was [*^your / ^Name's*] natural father when he died?

INTERVIEWER: If the respondent doesn't know the exact age, ask for an estimate.  
Range: 0..120

*[CHECK ID19] SIGNAL: IF age at which natural father died younger than 16 years old*  
*[DiFAD < 16 ENG]*

INTERVIEWER: Are you sure they were this age when they died?

*[CHECK ID20] CHECK: IF age at which natural father dies is younger than 12 years old*

*IF [DiFAD < 12 ENG]*

INTERVIEWER: The age at which the respondent's father died is too young.  
Please change.

END OF FILTER

*IF Year father died not answered at last interview AND ((natural father still alive at last interview = No) OR (natural father still alive = No)) AND (natural father's date of birth is don't know or refusal) AND (natural father's date of birth at last interview not given )*

*[IF (ff\_DiFdyr = 9991, 9998, 9999, empty) AND ((DiNFA = No) OR (ff\_DinFa | = No)) THEN*

*IF (DiFDOB = DK OR DiFDOB = REF) AND (ff\_DiFDOB\_ = 9991, 9998, 9999, empty)]*

**DIFDYR\***

What year did [*^your / ^Name's*] father die?

INTERVIEWER: If the respondent doesn't know the exact year, ask for an estimate  
RANGE: 1920..2015

*[CHECK ID21] SIGNAL: IF year father died before year respondent was born*

*CHECK: IF DiFdYr < IDoB.Year*

*This is before ^IName was born. Please check*

END OF FILTER

*IF (natural father still alive = No) [DiNFA = 2]*

**DICDNF \***

SHOW CARD B3

Did [*^your / ^Name's*] natural father] 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

END OF FILTER

*IF Age natural father finished full time education not answered at last interview  
[IF (FF\_DiPaEdu = 9991, 9998, 9999, empty)]*

**DIPAEDU \***

At what age did [^your / ^Name's] natural father finish his continuous full-time education at school or college?

- 01 Never went to school
- 02 14 or under
- 03 At 15
- 04 At 16
- 05 At 17
- 06 At 18
- 07 19 or over

END OF FILTER

*IF who lived with for most of childhood at last interview = NA, DK, Ref, new partner  
[ff\_DiKLiv = 9991, 9998, 9999, empty ]*

**DIKLIV \***

Who did [^you/he/she] live with for most of [^your/his/her] childhood?

- 01 Both natural parents
- 02 Natural mother and step-father
- 03 Natural father and step-mother
- 04 Natural mother
- 05 Natural father
- 06 Step-parents
- 07 Foster Parents
- 08 Adoptive parents
- 09 Children's Home
- 95 Other (specify)

END OF FILTER

*IF who lived with for most of childhood = Other [DiKLiv = 95]*

**DIKLO \***

INTERVIEWER: write in who respondent lived with.  
String 20

***[Open responses to DIKLO were coded and then incorporated into DIKLIV.]***

END OF FILTER

*IF who lived with for most of childhood = RESPONSE AND who lived with for most of  
childhood <> Children's Home*

*[DiKLiv = RESPONSE AND DiKLiv <> 9]*

**DIFJOB \***

What was [^your/^Name's] [^main carer's / father's / step-father's / foster father's /

adoptive father's / mother's] main occupation when [^you were / he was / she was]

14?

01 Armed Forces

02 Manager or senior official in someone else's business

03 Running his own business

04 Professional or technical

05 Administrative, clerical or secretarial

06 Skilled trade

07 Caring, leisure, travel or personal services

08 Sales or customer service

09 Plant, process or machine drivers or operators

10 Other jobs

11 Something else

12 Casual jobs

13 Retired

14 Unemployed

15 Sick / disabled

END OF FILTER

**DITSET \***

INTERVIEWER: The Individual Demographics section is finished.

Please enter 1 here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

# HEALTH MODULE (HE)

*Note: At Wave 11, some unproductive individuals from the Wave 10 refreshment sample were issued again. Some of these respondents were in households with people who were productive at Wave 10. In Wave 11 in these households, the respondents who were unproductive at Wave 10 were considered as “refreshment” cases whereas those who were productive were considered as “existing” sample. The household as a whole was considered as an “existing” sample household. In order to collect the necessary data for these respondents, a refreshment flag at the individual level was created: RefreshIV. The derivation for RefreshIV is as follows:*

*If Cohort<10, RefreshIV = No  
If Cohort=10 and IVout<30, RefreshIV = No  
If Cohort=10 and IVout=>30, RefreshIV = Yes  
If Cohort=11, RefreshIV = Yes*

## HEHELP

Now I would like to ask you some questions about your health. Would you say your health is...

INTERVIEWER: READ OUT

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

## HELL\*

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

1. Yes
2. No

*IF whether has long-standing illness = yes*

| [HeIII = 1]

## HELIM\*

(Does this / Do these) illness(es) or disability(ies) limit [^your / [^name's]] activities in any way?

1. Yes
2. No

END OF FILTER

## HELWK

Do you have any health problem or disability that limits the kind or amount of paid work you could do, should you want to?

1. Yes
2. No

*IF whether health limits paid work = yes*

| [HeLWk = 1]

## HETEMP



Is this a health problem or disability that you expect to last less than three months?

1. Yes
2. No

END OF FILTER

## COVID – 19

The next few questions are about the coronavirus (Covid-19) outbreak that began in February 2020.

INTERVIEWER: Press 1 and [Enter] to continue.

*IF respondent had a previous positive Covid-19 test*

*[(IF FF\_HECVConf=yes)]*

### **HECVConf**

Our records show that [^you/he/she] [^have/has] told us before that [^you/he/she] [^have/has] had a positive test for coronavirus (Covid-19).

CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD.

1. Yes
2. No

END OF FILTER

*IF FF\_hecvConf = No, DK, RF, or EMPTY*

*[(IF ff\_hecvConf= No, 9991,9998,9999 or empty) OR HECVConf = No*

### **HEEvrCv\***

[^Have/Has] [^you/Name] ever had a positive test for coronavirus (Covid-19) or been told by a doctor or other healthcare professional that [^you/he/she] [^have/has] or [^have/has] had coronavirus (Covid-19)?

1. Yes
2. No

END OF FILTER

*IF HEEvrCv = Yes or HECVConf= 1*

### **HECVYr\***

When did [^you / [Name]] first test positive for coronavirus (COVID-19) (or were told by a doctor or other healthcare professional that [^you/he/she] had coronavirus)?

INTERVIEWER: ENTER RESPONSE IN MONTH AND YEAR.

INTERVIEWER: ENTER THE YEAR AT THIS QUESTION.

Range: 1900..2050

End of filter

### **HECVMnth\***

ENTER THE MONTH AT THIS QUESTION.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June

07 July  
08 August  
09 September  
10 October  
11 November  
12 December

*IF (IF HEEvrCv = Yes or HECvConf= Yes)*

**HECvSym\***

When [*^you/^Name*] had COVID-19, did [*^you/he/she*] have symptoms?

INTERVIEWER: IF RESPONDENT HAS HAD COVID MORE THAN ONCE, ASK THEM IF THEY HAVE EVER HAD SYMPTOMS.

1. Yes
2. No

**HECvHosp**

[*^Have you/Has he/ Has she*] had to stay in hospital for treatment due to coronavirus (Covid-19)?"

INTERVIEWER: IF RESPONDENT HAS HAD COVID MORE THAN ONCE, ASK THEM IF THEY HAVE EVER HAD TO STAY IN HOSPITAL FOR TREATMENT.

1. Yes
2. No

END OF FILTER

*IF confirmed that had symptoms*

[*HECvSym = 1*]

**HECvSymE\***

**SHOWCARD C1**

Which of the following would best describe [*^your/his/her*] experience of symptoms?

INTERVIEWER: If they have caught COVID-19 more than once, please ask them to answer about the longest episode of illness they experienced.

1. My symptoms were worse at the beginning (the first 1-2 weeks) and then got better
2. My symptoms were worse at the beginning (the first 1-2 weeks) and then mostly got better but some lingered
3. After the first 1-2 weeks, my symptoms got better but then the same symptoms kept/ keep coming back
4. After the first 1-2 weeks, my symptoms got better but I then developed new symptoms
5. Most of my symptoms lasted for 2-3 weeks
6. Most of my symptoms lasted for 4-12 weeks
7. Most of my symptoms lasted for more than 12 weeks
8. SPONTANEOUS: Had COVID very recently so cannot answer

END OF FILTER

*IF HEEvrCv = Yes or HECvConf= 1*

**HECvLong\***

Have [*^you/he/she*] been told by a doctor that [*^you/he/she*] [*^have/has*] any long-standing illness or disability caused by coronavirus (COVID-19)?

INTERVIEWER: IF QUERIED BY RESPONDENT WHY WE ARE ASKING THIS:

"COVID-19 has been linked to several long-lasting conditions despite the severity of the infection (whether someone was symptomatic or asymptomatic)"

1. Yes

| 2. No  
END OF FILTER

*IF have any long-standing illness or disability caused by COVID*  
| *[(HECvLong=1)]*

**HECvLCon\***  
**SHOWCARD C2**

Please indicate what new condition, illness or disability [*^your/his/her*] doctor has linked to coronavirus/COVID-19?

1. Fatigue
2. A blood clot in the leg, heart lung or brain
3. Cough
4. Shortness of breath
5. Chest tightness
6. A lung condition
7. Loss of sense of smell
8. Difficulty concentrating
9. Brain fog
10. Headaches
11. Depression and anxiety
12. A heart condition
13. Another condition affecting the mind or brain
14. A condition affecting the nervous system excluding the brain
15. Joint pains
16. Diarrhoea
17. Other – please specify \_\_\_\_\_

*IF type of condition = other*  
| *[(HECvLongCon = Other)]*

**HECvLCnO**

INTERVIEWER: Enter name of other condition, illness or disability.  
String 1000

END OF FILTER

**HECvLLim**

Does this illness or disability limit [*^your/his/her*] activities in any way?

1. Yes
2. No

END OF FILTER

**HEVaccine**  
**SHOWCARD C2a**

Have you ever received any of the following vaccines?

CODE ALL THAT APPLY

- 1 Covid-19 vaccine or booster
- 2 Flu vaccine
- 3 Pneumococcal (PPV) vaccine
- 4 Shingles vaccine
- 5 None of these

Loop for each answer given at HEVaccine  
If HEVaccine = 1, 2, 3 or 4 (Covid, flu, PPV or shingles)

### HEVaccWhen

Did you receive your most recent [^answer at HEVaccine] in the last twelve months, that is since <date 12 months ago>?

- 1 Yes
- 2 No

## Difficulty walking

### HEFINT\*

The next question asks about difficulties [^you/[^Name]] 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.

1. Press [1] and [Enter] to continue.

### HEFUNC\*

By [^yourself / himself / herself] and without using any special equipment, how much difficulty [^do you / does [^name]] have walking for a quarter of a mile? [^Do you / Does he / Does she] have...

INTERVIEWER: READ OUT

1. ...no difficulty,
2. some difficulty,
3. much difficulty,
4. or, [^are you / is he / is she] unable to do this?

## Eyesight

### HEEYE\*

Is [^your / [^name's]] eyesight (using glasses or corrective lens if [^you use / he uses / she uses] them)...

INTERVIEWER: READ OUT

1. ...excellent,
2. very good,
3. good,
4. fair,
5. or, poor?
6. SPONTANEOUS: Registered or legally blind

*If eyesight is fair, poor, or blind [HEEYE = 4, 5, or 6]*

### HEEYEA\*

[^Are/Is] [^you/[^Name]] registered with your local council as partially sighted (also known as sight impaired), or blind (also known as severely sight impaired)?

1. Partially sighted (also known as sight impaired)
2. Blind (also known as severely sight impaired)
3. Not registered as being sight impaired

END OF FILTER

*If (eyesight condition = excellent, very good, good, fair or poor) [Heeye = 1, 2, 3, 4, or 5]*

### HEFRND\*

How good is [**^your / ^name's**] eyesight for seeing things at a distance, like recognising a friend across the street (using glasses or corrective lenses if [**^you use / he uses / she uses**] them)? Would you say it is...

INTERVIEWER: READ OUT

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

**HEPAP\***

How good is [**^your / ^name's**] eyesight for seeing things up close, like reading ordinary newspaper print (using glasses or corrective lenses if [**^you use / he uses / she uses**] them)? Would you say it is...

INTERVIEWER: READ OUT

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

END OF FILTER

## Eye conditions

*IF reported at W10 ever had glaucoma =yes [(FF\_HEEverGL = 1)] OR (FF\_HEEverGL = 2 AND FF\_HENvrGL = 1)*

**HEOPCGL**

Our records show that when we last interviewed you on [**^<date of last interview>**], you said that you had (or had been told by a doctor, health professional or optician you had) glaucoma or suspected glaucoma.

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD. IF RESPONDENT HAD CONDITION AT LAST INTERVIEW BUT DOES NOT HAVE CONDITION NOW, CODE 1.

- 1 Yes
- 2 No, respondent has never had condition

END OF FILTER

*IF reported at W10 had diabetic eye condition (FF\_HEEverDE = 1) OR (FF\_HEEverDE = 2 AND FF\_HENvrDE = 1)*

**HEOPCDE**

Our records show that when we last interviewed you on [**^<date of last interview>**], you said that you had (or had been told by a doctor, health professional or optician you had) diabetic eye disease.

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD. IF RESPONDENT HAD CONDITION AT LAST INTERVIEW BUT DOES NOT HAVE CONDITION NOW, CODE 1.

- 1 Yes
- 2 No, respondent has never had condition

END OF FILTER

*IF reported at W10 had macular degeneration (FF\_HEEverMD = 1) OR (FF\_HEEverMD = 2 AND FF\_HENvrMD = 1)*

**HEOPCMD**

Our records show that when we last interviewed you on [**^<date of last interview>**], you said that you had (or had been told by a doctor, health professional or optician you had) macular degeneration.

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD. IF RESPONDENT HAD CONDITION AT LAST INTERVIEW BUT DOES NOT HAVE CONDITION NOW, CODE 1.

1 Yes

2 No, respondent has never had condition

END OF FILTER

*IF reported at W10 had cataracts (FF\_HEEVerCT = 1) OR (FF\_HEEVerCT = 2 AND FF\_HENvrCT = 1)*

**HEOPCCT**

Our records show that when we last interviewed you on [**^date of last interview**], you said that you had (or had been told by a doctor, health professional or optician you had) cataracts].

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD. IF RESPONDENT HAD CONDITION AT LAST INTERVIEW BUT DOES NOT HAVE CONDITION NOW, CODE 1.

1 Yes

2 No, respondent has never had condition

END OF FILTER

*If never diagnosed with glaucoma or diabetic eye condition or macular degeneration or cataracts at wave 10 or refreshment sample or proxy*

*(If (FF\_HEEVerGL = 2 (no) or (FF\_HEEVerGL = 1 (yes) AND FF\_HENvrGL = 2, 3 or 4 (incorrectly diagnosed with glaucoma))) OR (FF\_HEEVerDE = 2 (no) or (FF\_HEEVerDE = 1 (yes) AND HENvrDE = 2, 3 or 4 (incorrectly diagnosed with diabetic eye disease))) OR (FF\_HEEVerMD = 2 (no) or (FF\_HEEVerMD = 1 (yes) AND FF\_HENvrMD = 2, 3 or 4 (incorrectly diagnosed with macular degeneration))) OR (FF\_HEEVerCT = 2 (no) or (FF\_HEEVerCT = 1 (yes) AND FF\_HENvrCT = 2, 3 or 4 (incorrectly diagnosed with cataracts))) OR RefreshIV = yes or proxy interview*

**HEOPT\***

[**^Has / Apart from what you have already told us and thinking about what has happened since we last saw [^you / ^name] on [^date of last interview] has a doctor, health professional or optician [^BLANK /ever] told [^you/ ^name] that [^you have/ he has/ she has] (or [^you/ he/ she] had) any of these [^BLANK /other] conditions...**

INTERVIEWER: READ OUT EACH IN TURN AND CODE ALL THAT APPLY.

INTERVIEWER: INCLUDE DIABETIC RETINOPATHY IN CODE 2.

INTERVIEWER: 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

ENDFILTER

*LOOP FOR EACH CONDITION REPORTED AT HEOPT*

*IF HEOPT = 1, 2, 3 or 4 (glaucoma, diabetic, macular degeneration or cataracts THEN*

| **HEOptYr\***

When [^were you / was [^Name]] first told by a doctor, optician or other health professional that [^you/he/she] had <^glaucoma/diabetic eye disease/macular degeneration/cataracts>?

INTERVIEWER: ENTER RESPONSE IN MONTH AND YEAR.

INTERVIEWER: ENTER THE **YEAR** AT THIS QUESTION.

Range: 1900..2023

**HEOptMth\***

INTERVIEWER:

ENTER THE **MONTH** AT THIS QUESTION.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

*ASK IF HEOptYr AND HEOptMth = don't know*

**HEAge\***

Approximately how old [^were you /was [^name]] when [^you were /he was /she was] | first told by a doctor, optician or other health professional that [^you /he /she] had <^glaucoma/diabetic eye disease/macular degeneration/cataracts>?

INTERVIEWER: ENTER AGE IN YEARS.

Range: 0..110

END FILTER

END FILTER

ENDLOOP

*LOOP IF (GLAUCOMA, MACULAR DEGENERATION OR DIABETIC EYE CONDITION PREVIOUSLY REPORTED AT W10 OR GLAUCOMA, MACULAR DEGENERATION OR DIABETIC EYE CONDITION REPORTED AT HEOPT IF (HEOPCGL = 1 or HEOPCDE = 1 or HEOPCMD = 1) OR HEOPT = 1,2 or 3 )*

**HEHave**

[^Do you/Does [Name]...READ OUT...

INTERVIEWER: IF RESPONDENT CONSIDERS THEY DO NOT HAVE CONDITION BUT THEY ARE TAKING MEDICATION OR TREATMENT FOR CONDITION, USE CODE 2.

1.... still have [^glaucoma/ diabetic eye disease/ macular degeneration] but [^you are/ she is / he is] **not** taking medication or treatment for it,

2. or, [^do you/ does [Name]] still have [^glaucoma/ diabetic eye disease/ macular degeneration] and [^you **are** /he **is**/ she **is**] taking medication or treatment for it,

3. or [^do you/does [Name]] no longer have [^glaucoma/ diabetic eye disease/ macular degeneration]?

ENDFILTER

END LOOP

*Ask if (confirmed report at Wave 10 that had cataracts ) or newly diagnosed with cataracts*

*IF HEOPCCT = 1 OR HEOPT = 4 (cataracts)*

**HEHaveCT\***

[^Do you/Does [Name]] currently have cataracts?

01 Yes

02 No

**HEDREYE\* (archive: HEDREYR)**

Text fill if <(FF\_HEEverCT = 1 (yes) or (FF\_HEEverCT = 2 (no) AND FF\_HENvrCT = 1 (correct, diagnosed with cataracts)) and NOT proxy interview> [^Can I check for our records, has]

Text fill if <HEOPT = 4 (Cataracts) OR previously had cataracts and proxy interview <(FF\_HEEverCT = 1 (yes) or (FF\_HEEverCT = 2 (no) AND FF\_HENvrCT = 1 (correct, diagnosed with cataracts)) AND proxy interview>: [^Has]

a doctor, optician or other health professional ever recommended that [^you/he/she] [^have/has] your cataracts removed?

INTERVIEWER: IF RESPONDENT HAS ONLY BEEN TOLD THAT THEIR CATARACTS MIGHT NEED TO BE REMOVED IN THE FUTURE PLEASE CODE NO

01 Yes

02 No

*If ever recommended to have cataracts = Yes [(HEDREYE = Yes)]*

**HECAT\***

[^Have you / Has [Name]] ever had cataract surgery?

01 Yes

02 No

*IF has had cataract surgery [(HeCat = 1)]*

**HECATN\***

Was [^your/[^name's]] cataract surgery paid for privately or by the NHS?

INTERVIEWER: COUNT AS NHS IF THE OPERATION WAS ON PRIVATE PREMISES BUT PAID FOR BY THE. COUNT AS PRIVATE IF THE OPERATION WAS ON NHS PREMISES BUT PAID FOR PRIVATELY. INTERVIEWER: RECORD MOST RECENT IF MORE THAN ONE SURGERY.

1. Privately/Insurance

2. NHS

3. Both

END OF FILTER

END OF FILTER

END OF FILTER

## Hearing/ Smell / Taste

**HEHEAR\***

Is [^your / [^name's]] hearing (using a hearing aid if [^you use / he uses / she uses] one)...

INTERVIEWER: 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)?

1. Yes
2. No

### HESSME\*

Is [<sup>^</sup>your/ [Name]'s] sense of smell...

INTERVIEWER: READ OUT

01. Excellent
02. Very good
03. Good
04. Fair
05. Poor

### HESTAS\*

Is [<sup>^</sup>your/ [Name]'s] sense of taste...

INTERVIEWER: READ OUT

01. Excellent
02. Very good
03. Good
04. Fair
05. Poor

## Dental

### HEDNTA\*

Would you say [<sup>^</sup>your/ [Name]'s] dental health (mouth, teeth and/or dentures) is

INTERVIEWER: READ OUT

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

### HEDNTB\*

#### SHOWCARD C3

In the past 6 months, have any problems with [<sup>^</sup>your/ [Name]'s] mouth, teeth or dentures caused [<sup>^</sup>you/him/her] to have any of the following?

INTERVIEWER: CODE ALL THAT APPLY.

1. Difficulty eating food
2. Difficulty speaking clearly
3. Problems with smiling, laughing and showing teeth without embarrassment
4. Problems with emotional stability, for example, becoming more easily upset than usual
5. Problems enjoying the company of other people such as family, friends or neighbours
96. None of these

***[Code maximum 5 out of 6 possible responses]***

Description	Variable	Archive
Difficulty eating food	Hedntb1	HeDntB1

Difficulty speaking clearly	Hedntb2	HeDntB2
Problems with smiling, laughing and showing teeth without embarrassment	Hedntb3	HeDntB3
Problems with emotional stability	Hedntb4	HeDntB4
Problems enjoying the company of other people	Hedntb5	HeDntB5
None of these	Hedntb96	HeDntB96

## Weight and Height

ASK ALL

### HEWeight

Now some questions about your height and weight. How much do you weigh without clothes?

INTERVIEWER: CODE UNIT OF MEASUREMENT. YOU CAN ACCEPT ESTIMATE IF RESPONDENT IS NOT SURE.

1. Kilograms
2. Stones and pounds
3. Cannot give estimate

*If HEWeight = kilograms*

### HEWTKILOS

INTERVIEWER: ENTER KILOGRAMS. ACCEPT ESTIMATES.

: 20..300

SOFT CHECK: {IF WTKILOS>160}: "Are you sure? This seems high. Please check."

SOFT CHECK: {IF WTKILOS<40}: "Are you sure? This seems low. Please check."

*If HEWeight = stones*

### HEWTSTONES

INTERVIEWER: ENTER STONES. ACCEPT ESTIMATES.

: 4..50

SOFT CHECK: {IF WTSTONES>25}: "Are you sure? This seems high. Please check."

SOFT CHECK: {IF WTSTONES<6}: "Are you sure? This seems low. Please check."

*If HEWeight = stones and HEWTStones <> DK or REF*

### HEWTPOUNDS

INTERVIEWER: ENTER POUNDS. ACCEPT ESTIMATES.

: 0..13

### HESWGH

Given your age and height, would you say that you are...

INTERVIEWER: READ OUT

01. About the right weight
02. Too heavy
03. Too light

### HESWGHA

At the present time, are you...

INTERVIEWER: READ OUT

01. Trying to lose weight
02. Tring to gain weight
03. Not trying to change your weight

*Ask all*

## HEHEIGHT

How tall are you without shoes?

INTERVIEWER: CODE UNIT OF MEASUREMENT. AN ESTIMATE IS ACCEPTABLE.

1. Metres and Centimetres
2. Feet and inches

Ask if HEHeight = metres

## HEHTMETRES

INTERVIEWER: ENTER METRES. ACCEPT ESTIMATES.

: 0..3

Ask if HEHeight = metres and HEHTMETRES = 0-3

## HTCENTEM

INTERVIEWER: ENTER CENTIMETRES. ACCEPT ESTIMATES.

: 0..99

SOFT CHECK: {IF HTMETRES < 1}: "That seems low. Are you sure?"

SOFT CHECK: {IF HTMETRES > 2}: "That seems high. Are you sure?"

Ask if HEHeight = feet

## HEHTFEET

INTERVIEWER: ENTER FEET. ACCEPT ESTIMATES.

: 3..8

SOFT CHECK: {IF HTFEET < 4}: "That seems low. Are you sure?"

SOFT CHECK: {IF HTFEET > 6}: "That seems high. Are you sure?"

Ask if Ask if HEHeight = feet and HEHTFEET = 3-8

INTERVIEWER: ENTER INCHES. ACCEPT ESTIMATES.

: 0..11

IF (age >= 65)

## HEBPCHK

In the past year, has any doctor or nurse checked your blood pressure?

1. Yes
2. No

END OF FILTER

## General health conditions

LOOP FOR EACH HEART CONDITION GIVEN IN Feedforward data

*IF reported any of the following conditions at wave 10: high blood pressure, angina, a heart attack, congestive heart failure, heart murmur, abnormal heart rhythm, a stroke, high cholesterol, another heart condition*

*IF (FF\_HEEverBP = 1 (yes) or (FF\_HEEverBP = 2 AND FF\_HENvrBP = 1 (correct, diagnosed with high BP) OR*

*(FF\_HEEverAN = 1 (yes) or (FF\_HEEverAN = 2 AND FF\_HENvrAN = 1 (correct, diagnosed with angina) OR*

*(FF\_HEEverMI = 1 (yes) or (FF\_HEEverMI = 2 AND FF\_HENvrMI = 1 (correct, diagnosed with a heart attack) OR*

*(FF\_HEEverHF = 1 (yes) or (FF\_HEEverHF = 2 AND FF\_HENvrHF = 1 (correct, diagnosed with congestive heart failure)*

*(FF\_HEEverHM = 1 (yes) or (FF\_HEEverHM = 2 AND FF\_HENvrHM = 1 (correct, diagnosed with a heart murmur) OR*

(FF\_HEEverAH = 1 (yes) or (FF\_HEEverAH = 2 AND FF\_HENvrAH = 1 (correct, diagnosed with abnormal heart rhythm) OR  
(FF\_HEEverST = 1 (yes) or (FF\_HEEverST = 2 AND FF\_HENvrST = 1 (correct, diagnosed with a stroke) OR  
(FF\_HEEverHC = 1 (yes) or (FF\_HEEverHC = 2 AND FF\_HENvrHC = 1 (correct, diagnosed with high cholesterol) OR  
(FF\_HEEverOH = 1 (yes) or (FF\_HEEverOH = 2 AND FF\_HENvrOH = 1 (correct, diagnosed with other heart condition)

#### **HEDIAC**

The next set of questions ask about health conditions.

Our records show that when we last interviewed you on [^<date of last interview>], you said that you had (or had been told by a doctor or other health professional or you had) [^high blood pressure or hypertension / angina / a heart attack (including myocardial infarction or coronary thrombosis) / congestive heart failure / a heart murmur / an abnormal heart rhythm / a stroke / high cholesterol / another heart condition].

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD. IF RESPONDENT HAD CONDITION AT LAST | | INTERVIEW BUT DOES NOT HAVE CONDITION NOW, CODE 1.

1 Yes

2 No, respondent has never had condition

END FILTER

END LOOP

*If never reported any of the following conditions at wave 10: high blood pressure, angina, a heart attack, congestive heart failure, heart murmur, abnormal heart rhythm, a stroke, high cholesterol, another heart condition or HEDIAC = 2 OR refreshment sample or proxy*

*If (FF\_HEEverBP = 2 (no) or (FF\_HEEverBP = 1 (yes) AND FF\_HENvrBP = 2, 3 or 4 (incorrectly diagnosed with high blood pressure))) OR*

*If (FF\_HEEverAN = 2 (no) or (FF\_HEEverAN = 1 (yes) AND FF\_HENvrAN = 2, 3 or 4 (incorrectly diagnosed with angina))) OR*

*If (FF\_HEEverMI = 2 (no) or (FF\_HEEverMI = 1 (yes) AND FF\_HENvrMI = 2, 3 or 4 (incorrectly diagnosed with heart attack))) OR*

*If (FF\_HEEverHF = 2 (no) or (FF\_HEEverHF = 1 (yes) AND FF\_HENvrHF = 2, 3 or 4 (incorrectly diagnosed with congestive heart failure))) OR*

*If (FF\_HEEverHM = 2 (no) or (FF\_HEEverHM = 1 (yes) AND FF\_HENvrHM = 2, 3 or 4 (incorrectly diagnosed with heart murmur))) OR*

*If (FF\_HEEverAH = 2 (no) or (FF\_HEEverAH = 1 (yes) AND FF\_HENvrAH = 2, 3 or 4 (incorrectly diagnosed with abnormal heart rhythm ))) OR*

*If (FF\_HEEverST = 2 (no) or (FF\_HEEverST = 1 (yes) AND FF\_HENvrST = 2, 3 or 4 (incorrectly diagnosed with stroke))) OR*

*If (FF\_HEEverHC = 2 (no) or (FF\_HEEverHC = 1 (yes) AND FF\_HENvrHC = 2, 3 or 4 (incorrectly diagnosed with high cholesterol))) OR*

*If (FF\_HEEverOH = 2 (no) or (FF\_HEEverOH = 1 (yes) AND FF\_HENvrOH = 2, 3 or 4 (incorrectly diagnosed with other heart condition))) OR*

*HEDIAC[loop] = No OR*

*RefreshIV = yes or proxy interview*

#### **HEDIIA\***

##### **SHOWCARD C3a**

[^Has / Apart from what you have already told us and thinking about what has happened] since we last saw [^you / [^name]] on [^date of last interview has]] a doctor or other health professional [^BLANK /ever] told [^you/ [^name]] that [^you have/ he has/ she has] (or

[^you/ he/ she] had) [^BLANK /any of these other conditions]...

INTERVIEWER: PROBE - 'What others?'

INTERVIEWER: CODE ALL THAT APPLY..

01 [^High blood pressure or hypertension]

02 [^Angina]

03 [^A heart attack (including myocardial infarction or coronary thrombosis)]

04 [^Congestive heart failure]

05 [^A heart murmur]

06 [^An abnormal heart rhythm]

07 [^A stroke (cerebral vascular disease)]

08 [^High cholesterol]

95 [^Any other heart condition (SPECIFY)]

96 None of these

*If have been diagnosed with other heart condition (Other heart condition IN HEDIAA)*

**HEOthCVD\***

INTERVIEWER: Enter name of other heart condition

: STRING

ENDFILTER

ENDFILTER

*LOOP FOR EACH CONDITION REPORTED AT HEDIAA*

*IF HEDIAA = 1, 2, 3, 4, 5, 6, 7, 8 or 95 (high blood pressure, angina, heart attack, congestive heart failure, heart murmur, abnormal heart rhythm, a stroke, high cholesterol or another heart condition THEN*

**HEHCYr\***

When [^were you / was [^Name]] first told by a doctor or other health professional that

[^you/he/she] had <^high blood pressure or hypertension / angina / a heart attack / congestive heart failure / a heart murmur / an abnormal heart rhythm / a stroke / high cholesterol / another heart condition>?

INTERVIEWER: ENTER RESPONSE IN MONTH AND YEAR.

INTERVIEWER: ENTER THE **YEAR** AT THIS QUESTION.

| Range: 1900..2200

**HEHCMth\***

When [^were you / was [^Name]] first told by a doctor or other health professional that [^you/he/she] had <^high blood pressure or hypertension / angina / a heart attack / congestive heart failure / a heart murmur / an abnormal heart rhythm / a stroke / high cholesterol / another heart condition>?

ENTER THE *MONTH* AT THIS QUESTION.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

| ASK IF HEHCYr = don't know AND HEHCMth = don't know

**HEAge\***

Approximately how old [<sup>^</sup>were you /was [<sup>^</sup>name]] when [<sup>^</sup>you were /he was /she was] | first told by a doctor, optician or other health professional that [<sup>^</sup>you /he /she] had <<sup>^</sup>high blood pressure or hypertension / angina / a heart attack / congestive heart failure / a heart murmur / an abnormal heart rhythm / a stroke / high cholesterol / another heart condition?>

INTERVIEWER: ENTER AGE IN YEARS.

Range: 0..110

END FILTER

END FILTER

ENDLOOP

*LOOP IF FOLLOWING CONDITION REPORTED AT WAVE 10 AND CONFIRMED AT HEDIAC OR CONDITION REPORTED AT HEDIAA: high blood pressure, angina, congestive heart failure, heart murmur, abnormal heart rhythm, high cholesterol, other heart condition*

*IF HEDIACBP = yes or HEDIAA = 1 (Blood pressure) OR*

*HEDIACAN = yes or HEDIAA = 2 (angina) OR*

*HEDIACHF = yes or HEDIAA = 4 (congestive heart failure) OR*

*HEDIACHM = yes or HEDIAA = 5 (heart murmur) OR*

*HEDIACAH = yes or HEDIAA = 6 (abnormal heart rhythm) OR*

*HEDIACHC = yes or HEDIAA = 8 (high cholesterol) OR*

*HEDIACOH = yes or HEDIAA = 95 (other heart condition)*

*THEN*

**HEHaveH\***

[<sup>^</sup>Do you/Does [Name]...READ OUT...

INTERVIEWER: IF RESPONDENT CONSIDERS THEY DO NOT HAVE CONDITION BUT THEY ARE TAKING MEDICATION OR TREATMENT FOR CONDITION, USE CODE 2.

1.... still have [<sup>^</sup>high blood pressure / angina / congestive heart failure / a heart murmur / an abnormal heart rhythm / high cholesterol / other heart condition] but [<sup>^</sup>you are/ she is / he is] **not** taking medication or treatment for it,

2. or, [<sup>^</sup>do you/ does [Name]] still have [<sup>^</sup>high blood pressure / angina / congestive heart failure / a heart murmur / an abnormal heart rhythm / high cholesterol / other heart condition] and [<sup>^</sup>you are /he is/ she is]] taking medication or treatment for it,

3. or [<sup>^</sup>do you/does [Name]] no longer have [<sup>^</sup>high blood pressure / angina / congestive heart failure / a heart murmur / an abnormal heart rhythm / high cholesterol / other heart condition]?

ENDFILTER

END LOOP

**Heart Attack**

*ASK IF heart attack in feedforward and not disputed (HEDIAC[HeartAtt] = yes) and NOT Proxy]*

**HEOthHA**

Since the last heart attack you told us about [(if date of heart attack = RESPONSE): in <sup>^</sup>FFHEDateMMI <sup>^</sup>FFHEDateYMI], has a doctor or other health professional told you that you have had another heart attack?

01 Yes

02 No

END OF FILTER

ASK IF ever diagnosed with heart attack *HEADIAC[HeartAtt] = yes and not proxy) OR (Heart Attack IN HEDIIA)]*

**HEMedHA**

[^Are you/ Is [^Name]] currently taking any prescribed medication or treatment for [^your/his/her] heart attack?

01 Yes

02 No

END OF FILTER

**Stroke**

ASK IF (stroke in feedforward and not disputed (*HEDIAC[Stroke] = yes*) and NOT Proxy]

**HEOthSt**

Since the last stroke you told us about [(if date of stroke = RESPONSE): in ^FFHEDateMMI ^FFHEDateYMI], has a doctor or other health professional told you that you have had another stroke?

01 Yes

02 No

END OF FILTER

ASK IF ever diagnosed with stroke [*HEADIAC[Stroke] = yes and not proxy) OR (Stroke IN HEDIIA)]*

**HEMedSt**

[^Are you/ Is [^Name]] currently taking any prescribed medication or treatment for [^your/his/her] stroke?

01 Yes

02 No

**HEPBS\***

[^Do you/Does [^Name]] have any remaining problems because of [^your/his/her] stroke(s)?

01 Yes

02 No

END OF FILTER

IF ((age >=55 AND age <=75) OR Sex =female AND age >=47 AND age <=73)) then

**HESCRE**

I would like to ask you about any screening you may have had to check for different types of cancer.

1. Press [1] and [Enter] to continue

IF age >= 55 AND age <= 75) then

**HEBOWD**

Have you ever completed the NHS bowel cancer screening test using the home test kit?

1. Yes

2. No

*IF completed the NHS bowel cancer screening test*

*[HEBowD = Yes]*

**HEYBOWT**

How long ago was your most recent bowel cancer screening test?

INTERVIEWER: ENTER THE **YEAR** HERE.

: 1900..2050

**[Responses are recoded in HEBOWTY]**

**HEMBOWT (archive: HEBOWTM)**

How long ago was your most recent bowel cancer screening test?

INTERVIEWER: ENTER THE **MONTH** HERE.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

END OF FILTER

END OF FILTER

*IF (sex = female AND age >= 47 AND age <= 73)*

*[IF (ISex[Pnum] = Female AND IAgeOf[Pnum] >= 47 AND IAgeOf[Pnum] <= 73)]*

**HEMAMB**

Have you ever had breast cancer screening (a mammogram or x-ray of your breasts) as part of the NHS breast screening programme?

1. Yes

2. No

*IF breast cancer screening as part of NHS programme=yes*

*[HeMamB=1]*

**HEYMAMT**

How long ago was your most recent breast screening mammogram?

INTERVIEWER: ENTER THE **YEAR** HERE.

: 1900..2050

**HEMMAMT**

How long ago was your most recent breast screening mammogram?

INTERVIEWER: ENTER THE **MONTH** HERE.

01 January

02 February

03 March

04 April

05 May

06 June



- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

END OF FILTER

END OF FILTER

*IF sex = male [IF ISex[PNum] = Male]*

### **HEPRO**

Have you ever had a prostate-specific antigen (PSA) blood test or other examination to screen for prostate cancer?

1. Yes
2. No

*IF PSA blood test or examination to screen for prostate cancer =yes  
[HePro=1]*

### **HEYPROT**

How long ago was your most recent PSA test or other examination?

INTERVIEWER: ENTER THE **YEAR** HERE."

/"When was most recent PSA test"

: 1900..2050

### **HEMPROT**

How long ago was your most recent PSA test or other examination?

INTERVIEWER: ENTER THE **MONTH** HERE.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

END OF FILTER

END OF FILTER

END OF FILTER

**ASK ALL**

### **HEIntro2**

I'd now like to ask you about other health conditions.

: Press 1 to continue

**LOOP FOR EACH OTHER CONDITION PREVIOUSLY REPORTED AT WAVE 10**

*IF reported any of the following conditions at wave 10: chronic lung function, asthma, arthritis, osteoporosis, cancer, Parkinsons Disease, emotional, nervous or psychiatric disorder, Alzheimer's disease, dementia, malignant blood disorder, diabetes.*

*IF (FF\_HEEverCL = 1 (yes) or (FF\_HEEverCL = 2 AND FFHENvrCL = 1 (correct, diagnosed with chronic lung disease) OR*

*IF (FF\_HEEverAS = 1 (yes) or (FF\_HEEverAS = 2 AND FFHENvrAS = 1 (correct, diagnosed with asthma) OR*

*IF (FF\_HEEverAR = 1 (yes) or (FF\_HEEverAR = 2 AND FFHENvrAR = 1 (correct, diagnosed with arthritis) OR*

*IF (FF\_HEEverOS = 1 (yes) or (FF\_HEEverOS = 2 AND FFHENvrOS = 1 (correct, diagnosed with osteoporosis) OR*

*IF (FF\_HEEverCA = 1 (yes) or (FF\_HEEverCA = 2 AND FFHENvrCA = 1 (correct, diagnosed with cancer) OR*

*IF (FF\_HEEverPD = 1 (yes) or (FF\_HEEverPD = 2 AND FFHENvrPD = 1 (correct, diagnosed with Parkinsons Disease) OR*

*IF (FF\_HEEverPS = 1 (yes) or (FF\_HEEverPS = 2 AND FFHENvrPS = 1 (correct, diagnosed with emotional, nervous or psychiatric problem) OR*

*IF (FF\_HEEverAD = 1 (yes) or (FF\_HEEverAD = 2 AND FFHENvrAD = 1 (correct, diagnosed with Alzheimers Disease) OR*

*IF (FF\_HEEverDM = 1 (yes) or (FF\_HEEverDM = 2 AND FFHENvrDM = 1 (correct, diagnosed with dementia) OR*

*IF (FF\_HEEverBL = 1 (yes) or (FF\_HEEverBL = 2 AND FFHENvrBL = 1 (correct, diagnosed with malignant blood disorder) OR*

*IF (FF\_HEEverDI = 1 (yes) or (FF\_HEEverDI = 2 AND FFHENvrDI = 1 (correct, diagnosed with diabetes) and not proxy*

**HEDIAD**

Our records show that when we last interviewed you on [<sup>^</sup><date of last interview>], you said that you had (or had been told by a doctor or other health professional or you had) [<sup>^</sup>chronic lung disease (such as chronic bronchitis or emphysema) / asthma / arthritis (including osteoarthritis or rheumatism) / osteoporosis (or thin or brittle bones) / cancer or a malignant tumour (excluding minor skin cancers) / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia / a malignant blood disorder (e.g. leukaemia) / Multiple Sclerosis or Motor Neurone Disease / diabetes]

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD. IF RESPONDENT HAD CONDITION AT LAST INTERVIEW BUT DOES NOT HAVE CONDITION NOW, CODE 1.

1 Yes

2 No, respondent has never had condition

END FILTER

END LOOP

*IF not a reported condition at wave 10 or disputed condition reported at wave 10 or refreshment sample or proxy interview*

*IF (FF\_HEEverCL = 2 (no) or (FF\_HEEverCL = 1 AND FFHENvrCL = 2, 3 or 4 (incorrectly diagnosed with chronic lung disease) OR*

*IF (FF\_HEEverAS = 2 (no) or (FF\_HEEverAS = 1 AND FFHENvrAS = 2, 3 or 4 (incorrectly diagnosed with asthma) OR*

*IF (FF\_HEEverAR = 2 (no) or (FF\_HEEverAR = 1 AND FFHENvrAR = 2, 3 or 4 (incorrectly diagnosed with arthritis) OR*

*IF (FF\_HEEverOS = 2 (no) or (FF\_HEEverOS = 1 AND FFHENvrOS = 2, 3 or 4 (incorrectly diagnosed with osteoporosis) OR*

IF (FF\_HEEeverCA = 2 (no) or (FF\_HEEeverCA = 1 AND FFHENvrCA = = 2, 3 or 4 (incorrectly diagnosed with cancer) OR  
 IF (FF\_HEEeverPD = 2 (no) or (FF\_HEEeverPD = 1 AND FFHENvrPD = = 2, 3 or 4 (incorrectly diagnosed with Parkinsons Disease) OR  
 IF (FF\_HEEeverPS = 2 (no) or (FF\_HEEeverPS = 1 AND FFHENvrPS = 2, 3 or 4 (incorrectly diagnosed with emotional, nervous or psychiatric problem) OR  
 IF (FF\_HEEeverAD = 2 (no) or (FF\_HEEeverAD = 1 AND FFHENvrAD = 2, 3 or 4 (incorrectly diagnosed with Alzheimers Disease) OR  
 IF (FF\_HEEeverDM = 2 (no) or (FF\_HEEeverDM = 1 AND FFHENvrDM = 2, 3 or 4 (incorrectly diagnosed with dementia) OR  
 IF (FF\_HEEeverBL = 2 (no) or (FF\_HEEeverBL = 1 AND FFHENvrBL = 2, 3 or 4 (incorrectly diagnosed with malignant blood disorder) OR  
 IF (FF\_HEEeverMS = 2 (no) or (FF\_HEEeverMS = 1 AND FFHENvrMS = 2, 3 or 4 (incorrectly diagnosed with Multiple Sclerosis or Motor Neurone Disease) OR  
 IF (FF\_HEEeverDI = 2 (no) or (FF\_HEEeverDI = 1 AND FFHENvrDI = = 2, 3 or 4 (incorrectly diagnosed with diabetes) OR  
 OR HEDIAD[loop] = No or refreshment = yes or proxy interview THEN

**HEDIDS\***

**SHOWCARD C3b**

[^Has / Apart from what you have already told us and thinking about what has happened since we last saw [^you / ^name]] on [^date of last interview has]] a doctor or other health professional [^BLANK /ever] told [^you/ ^name]] that [^you have/ he has/ she has] (or [^you/ he/ she] had) [^BLANK /any of these other conditions]...

INTERVIEWER: PROBE - 'What others?'

INTERVIEWER: CODE ALL THAT APPLY..

INTERVIEWER: INCLUDE MELANOMA AND EXCLUDE NON-MELANOMA SKIN CANCER – PRESS F9 FOR ADDITIONAL INFORMATION IF REQUIRED

*F9: please include melanoma (and other serious skin cancer such as skin cancer that has spread to other parts of the body) and exclude the common 'minor skin cancers' such as basal cell carcinoma and squamous cell carcinoma without any spread to other parts of the body.*

- 01 [^Chronic lung disease such as chronic bronchitis or emphysema]
- 02 [^Asthma]
- 03 [^Arthritis (including osteoarthritis or rheumatism)]
- 04 [^Osteoporosis (or thin or brittle bones)]
- 05 [^Cancer or a malignant tumour (excluding minor skin cancers)]
- 06 [^Parkinson's Disease]
- 07 [^An emotional, nervous or psychiatric problem]
- 08 [^Alzheimer's disease]
- 09 [^Dementia]
- 10 [^A malignant blood disorder (e.g. leukaemia)]
- 11 [^Multiple Sclerosis or Motor Neurone Disease]
- 12 [^Diabetes]
- 96 None of these

ENDFILTER

ASK IF (Arthritis IN HEDIDS)

**HEART \***

May I check, which type or types of arthritis [^do you / does ^name]] have...

INTERVIEWER: READ OUT EACH IN TURN AND CODE ALL THAT APPLY.

IF NO LONGER HAS ARTHRITIS, CODE TYPE OF ARTHRITIS THE RESPONDENT PREVIOUSLY HAD. PRESS [F9] FOR MORE DETAIL ABOUT CONDITIONS.

*F9 "Osteoarthritis is the most common type of arthritis in England. It causes pain and stiffness in the joints, usually the knees, hips, small joints of the hands, or lower back,*

*but can affect almost any joint. Rheumatoid arthritis causes pain, swelling and stiffness, at first in the joints of the hands and feet, but later any joint may be affected. It is usually worse first thing in the morning. Sometimes it is very painful, and at other times it may be only mildly uncomfortable."*

CODE ALL THAT APPLY

1. Osteoarthritis?
2. Rheumatoid arthritis?
3. Some other kind of arthritis?

END OF FILTER

LOOP FOR EACH CONDITION REPORTED AT HEDIDS

*IF HEDIDS = 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 or 11 or 12 (chronic lung disease, asthma, arthritis,, osteoporosis, cancer, Parkinson's Disease, emotional nervous or psychiatric problem, Alzheimer's Disease, dementia, malignant blood disorder, MS or motor neurone disease or diabetes) THEN*

**HEOthCYr\***

When [**^were you / was** [**^Name**]] first told by a doctor or other health professional that [**^you/he/she**] had <**^chronic lung disease / asthma / arthritis (including osteoarthritis or rheumatism / osteoporosis / cancer or a malignant tumour / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia / a malignant blood / Multiple Sclerosis or Motor Neurone Disease / diabetes**>?

INTERVIEWER: ENTER RESPONSE IN MONTH AND YEAR.

INTERVIEWER: ENTER THE **YEAR** AT THIS QUESTION.

Range: 1900..2200

**HEOtCMth\***

ENTER THE **MONTH** AT THIS QUESTION.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

*ASK IF HEOtCYr = don't know AND HEOtCMth = don't know*

**HEOthCAge\***

Approximately how old [**^were you /was** [**^name**]] when [**^you were /he was /she was**] | first told by a doctor, optician or other health professional that [**^you /he /she**] had <**^chronic lung disease / asthma / arthritis (including osteoarthritis | or rheumatism / osteoporosis / cancer or a malignant tumour / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia / a malignant blood / Multiple Sclerosis or Motor Neurone Disease / diabetes**>?

INTERVIEWER: ENTER AGE IN YEARS.

Range: 0..110

END FILTER

END FILTER

ENDLOOP

*If (Cancer IN HEDIDS)*

**HECANAA\*** (archived under SL; recoded variable HECANAAR - which collapses Leukaemia/Lymphoma categories – is archived under EUL)

**SHOWCARD C4**

In which part of [**^your / ^name's**] body did [**^your /his /her**] (cancer /cancers / malignant tumour) start?

INTERVIEWER: CODE ONE ONLY.

IF RESPONDENT HAS HAD MORE THAN ONE DIAGNOSIS, RECORD MOST RECENT.

1. Breast
2. Prostate
3. Lung
4. Colon, bowel or rectum
5. Melanoma or other skin cancer
6. Lymphoma
7. Kidney
8. Head and neck or brain
9. Pancreas
10. Bladder
11. Uterus or ovary
12. Leukaemia
95. Somewhere else

END FILTER

*If diagnosed with emotional, nervous or psychiatric problem since last interview or refreshment sample and diagnosed with emotional, nervous or psychiatric problem (Emotional IN HEDIDS)*

**HEPSY\***

**SHOWCARD C5**

What type of emotional, nervous or psychiatric problems [**If HEHavePS = 1 or 2: ^do/does**] [**you/[Name]**] [**If HEHavePS = 3 ^did**] [**you/[Name]**] have?

INTERVIEWER: PROBE - 'What others?'

CODE ALL THAT APPLY.

INCLUDE PANIC ATTACKS UNDER 'anxiety'.

1. Hallucinations
2. Anxiety
3. Depression
4. Emotional problems
5. Schizophrenia
6. Psychosis
7. Mood swings
8. Bipolar disease (manic depression)
95. Something else

END OF FILTER

*If diagnosed with malignant blood disorder since last interview or refreshment sample and diagnosed with malignant blood disorder (Malignant Blood Disorder IN HEDIDS)*

**HELEUK\***

[**^Do you / Does name**] have one of the following blood disorders...

INTERVIEWER: READ OUT

- 1 ...leukaemia,
- 2 ...lymphoma,
- 3 or some other blood disorder?

[^BLText:  
If HELEUK OR FFHELEUK = 1, BLText="leukaemia"  
If HELEUK OR FFHELEUK = 2, BLText="lymphoma"  
If HELEUK OR FFHELEUK = 3, BLText="a blood disorder"]

END OF FILTER

LOOP FOR EACH CONDITIONS REPORTED IN FEEDFORWARD OR REPORTED AT HEDIDS:

IF HEDIADCL = 1 OR HEDIDS = 1 (chronic lung disease) OR  
IF HEDIADAS = 1 OR HEDIDS = 2 (asthma) OR  
IF HEDIADAR = 1 OR HEDIDS = 3 (arthritis) OR  
IF HEDIADOS = 1 OR HEDIDS = 4 (osteoporosis) OR  
IF HEDIADCA = 1 OR HEDIDS = 5 (cancer) OR  
IF HEDIADPD = 1 OR HEDIDS = 6 (Parkinson's Disease) OR  
IF HEDIADPS = 1 OR HEDIDS = 7 (emotional, nervous or psychiatric problem) OR  
IF HEDIADAD = 1 OR HEDIDS = 8 (Alzheimer's disease) OR  
IF HEDIADDM = 1 OR HEDIDS = 9 (dementia) OR  
IF HEDIADBL = 1 OR HEDIDS = 10 (malignant blood disorder) OR  
IF HEDIADMS = 1 OR HEDIDS = 11 (MS or motor neurone disease) OR  
IF HEDIADDI = 1 OR HEDIDS = 12 (diabetes)

THEN

**HEHaveH\***

[^Do you/Does [Name]...READ OUT...

INTERVIEWER: IF RESPONDENT CONSIDERS THEY DO NOT HAVE CONDITION BUT THEY ARE TAKING MEDICATION OR TREATMENT FOR CONDITION, USE CODE 2.

1.... still have [^chronic lung disease / asthma / arthritis / osteoporosis / cancer or a malignant tumour / Parkinson's Disease / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia / a malignant blood disorder / Multiple Sclerosis or Motor Neurone Disease / diabetes] but [^you are/ she is / he is] **not** taking medication or treatment for it,

2. or, [^do you/ does [Name]] still have [^chronic lung disease / asthma / arthritis / osteoporosis / cancer or a malignant tumour / Parkinson's Disease / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia / a malignant blood disorder / Multiple Sclerosis or Motor Neurone Disease / diabetes] and [^you **are** /he **is**/ she **is**] taking medication or treatment for it,

3. or [^do you/does [Name]] no longer have [^chronic lung disease / asthma / arthritis / osteoporosis / cancer or a malignant tumour / Parkinson's Disease / an emotional, nervous or psychiatric problem / Alzheimer's disease / dementia / a malignant blood disorder / Multiple Sclerosis or Motor Neurone Disease / diabetes]?

ENDFILTER

END LOOP

## Drug coding

ASK ALL (including proxies)

**MEDCNJD\***

[Are you/Is ^Name] taking or using any medicines or drugs such as pills, syrups, ointments, patches, puffers or injections prescribed for [you/him/her] by a doctor or a nurse?

INTERVIEWER: If statins have been prescribed by a doctor please code them here. If they have been bought without a prescription code at the Statins question.

1. Yes

2. No
3. Yes, but unable to code as name of drug(s) not available

*IF respondent taking medication = Yes [MEDCNJD = 1]*

**MEDINTRO\***

Could I take down the names of the medicines or drugs such as pills, syrups, ointments, patches, puffers or injections, prescribed for [you/^Name] by a doctor or a nurse?

INTERVIEWER: INCLUDING THE CONTRACEPTIVE PILL.  
Press [1] and [Enter] to continue."

LOOP: Repeat **MEDBI, MEDBIA, MEDBIC** for up to 40 drugs

**MEDBI\***

INTERVIEWER: ENTER NAME OF MEDICINE OR DRUG. ASK IF YOU CAN SEE THE CONTAINERS FOR ALL PRESCRIBED MEDICINES CURRENTLY BEING TAKEN.

INTERVIEWER: PRESS [SPACE] TO ENTER THE LOOK-UP TABLE AND START TYPING THE NAME OF THE MEDICINE OR DRUG (NOT THE BRAND NAME). SELECT THE CORRECT MEDICINE AND DOSAGE AND PRESS ENTER TO SELECT.

IF YOU ARE UNABLE TO FIND THE MEDICINE OR YOU DO NOT HAVE THE DOSAGE, PRESS 'ESC' TO CLOSE THE LOOK-UP TABLE, ENTER CTRL-K AND MEDBL AND ENTER THE DETAILS AT THE NEXT QUESTION.

: LOOK-UP TABLE

*If MEDBI = Unable to code*

INTERVIEWER: Please type in the name and all the details you have for this medicine.  
: STRING

**MEDBIC\***

INTERVIEWER CHECK: Any more drugs to enter?"

01 Yes

02 No

**NUMMEDS\* (archived under SL)**

Computed: Number of medicines mentioned at MEDBI.

Range: 1..40

*END OF LOOP*

**MEDBIA\* (archived under SL as MEDBIA – MEDBIA22)**

[^Have/Has] [^you/he/she] taken/used *all of these medicines* in the last 7 days?"

01 Yes

02 No

If MedBla = No

Which medicines have you **NOT** used in the last 7 days?

CODE ALL THAT APPLY

: List of all medicines coded at MedBI

*ASK ALL*

**STATINS\***

[Are you/Is ^Name] taking statins (drugs to lower cholesterol) bought over the counter from a pharmacist, without prescription from a doctor?

INTERVIEWER: Here are some examples of common statins, which may be bought over the counter:

Atorvastatin (Lipitor)

Fluvastatin (Lescol, Lescol XL)

Pravastatin (Lipostat)

Rosuvastatin (Crestor) and Simvastatin (Zocor)

01 Yes

02 No

*IF taking statins bought over the counter = Yes*

[STATINS=1]

**STATINA\***

[^Have you/Has ^Name]] taken/used statins in the last 7 days?

01 Yes

02 No

END OF FILTER

*IF first two digits of drug code = 02 and drug code is not '021200' (formerly*

*Statins/Lipid-lowering drugs)*

[DRC1= "02\*\*\*\*" and DRC1 <> 021200]

**YTAKE\* (archived under SL)**

[Do you/Does ^Name] take [^MedBI] because of a heart problem, high blood pressure or for some other reason?

CODE ALL THAT APPLY

1. Heart problem
2. High blood pressure
3. Other reason

*IF take drug for another reason*

[YTake = 3]

**TAKEOTH\***

INTERVIEWER: Give full details of reason(s) for taking [^MedBI].

Press [Esc] when finished.

: OPEN

END OF FILTER

END OF FILTER

## Vitamin D

### HEVitDTk

Do you take Vitamin D supplements, for any reason?

INTERVIEWER: IF RESPONDENT IS TAKING MULTIVITAMINS (WHICH INCLUDES VITAMIN D) CODE YES. MOST MULTIVITAMINS DO INCLUDE VITAMIN D.

1. Yes

2. No

### HEVitDAd

Has a doctor or nurse recommended you taking Vitamin D supplements?

1. Yes

2. No



## Falling

IF (Age of respondent >= 60)

[!AgeOf >= 60]

### HEFLA

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

1. Yes
2. No

IF whether fallen down = yes

[HeFla = 1]

### HEFLB

How many times have you fallen down [^since we last talked to you on [^date of last interview]/ in the last two years]?

Range: 0..400

**[CHECK HE1] CHECK:** IF (whether post-interview editing question = Yes) AND (Number of times fallen down =RESPONSE) [EditQre = 1 AND HeFlb = RESPONSE]

CHECK: (number of times fallen down ] 0) INVOLVING (whether fallen down, number of times fallen down)

[HeFlb ] 0 INVOLVING HeFla, HeFlb]

### HEFLC

In [^any of these falls / that fall], did you injure yourself seriously enough to need medical treatment?

1. Yes
2. No

END OF FILTER

END OF FILTER

IF person's age >= 60

[!AgeOf >= 60]

### HEFRAC\*

[^Have you [^BLANK / ever] fractured your hip replacements since we last talked to you on [^date of last interview]?

1. Yes
2. No

### HEJI\*

[^Have you / Has [^name]] [^BLANK / ever] had any joint replacements since we last talked to [^you / him / her] on [^date of last interview]?

1. Yes
2. No

IF whether had joint replacements = yes

[HeJi = 1]

### HEJIAA\*

Which joints did [^you/[^Name]] have replaced/resurfaced [^ever/ since the last interview]?

INTERVIEWER: PROBE - 'What others?'

INTERVIEWER: CODE ALL THAT APPLY.

1. Right hip
2. Left hip
3. Right knee
4. Left knee
5. Other joint

*[code maximum 5 out of 5 possible responses]*

Description	Variable	Archive
Right hip	HeJiaa1	HeJiaa1
Left hip	HeJiaa2	HeJiaa2
Right knee	HeJiaa3	HeJiaa3
Left knee	HeJiaa4	HeJiaa4
Other joint	HeJiaa5	HeJiaa5

*IF HeJiaa= right hip*

*[HEJiaa1=1]*

**HeJibRH\***

"Was the **right** hip replacement/resurfacing because of arthritis, a fracture, to replace a previous artificial hip, or for some other reason?

INTERVIEWER: ENTER THE MAIN REASON.

1. Arthritis,
2. Fracture,
3. Replacement of a previous artificial hip
95. Other reason

END OF FILTER

*IF HeJiaa= Left Hip*

*[HEJiaa2=1]*

**HeJibLH\***

"Was the **left** hip replacement because of arthritis, a fracture, to replace a previous artificial hip, or for some other reason?

INTERVIEWER: ENTER THE MAIN REASON.

1. Arthritis,
2. Fracture,
3. Replacement of a previous artificial hip
95. Other reason

END OF FILTER

*IF HeJiaa= Right Knee*

*[HEJiaa3=1]*

**HeJibRK\***

Was the **right** knee replacement because of arthritis, a fracture, to replace a previous artificial knee, or for some other reason?

INTERVIEWER: ENTER THE MAIN REASON.

1. Arthritis,
2. Fracture,
3. Replacement of a previous artificial knee
95. Other reason

END OF FILTER

*IF HeJiaa= Left Knee*

*[HEJiaa4=1]*

**HeJibLK\***

Was the **left** knee replacement because of arthritis, a fracture, to replace a previous artificial knee, or for some other reason?

INTERVIEWER: ENTER THE MAIN REASON.

1. Arthritis,
2. Fracture,
3. Replacement of a previous artificial knee
95. Other reason

END OF FILTER

*IF joints replaced = right hip, left hip, right knee, left knee, other joint*

*[HeJiaa =RESPONSE]*

**HEJION\***

Has [*^your/^name's*] joint replacement/resurfacing been paid for privately or by the NHS?

INTERVIEWER: COUNT AS NHS IF THE OPERATION WAS ON PRIVATE PREMISES BUT PAID FOR BY THE NHS. COUNT AS PRIVATE IF THE OPERATION WAS ON NHS PREMISES BUT PAID FOR PRIVATELY.

INCLUDE ALL JOINT REPLACEMENT OPERATIONS IF RESPONDENT HAS HAD MORE THAN ONE.

1. Privately/under insurance
2. NHS
3. SPONTANEOUSLY: Both

END OF FILTER

END OF FILTER

END OF FILTER

## Proxy – changes over two years

**HEIQA\*\***

**SHOWCARD C6**

Now we want you to remember what [*^name*] was like two years ago and to compare it with what [*^he / she*] is like now. Two years ago was in [*^MY2Yago*]. I will read out situations where [*^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 / since ^date of last interview*]. Note the importance of comparing [*^name's*] present performance with [*^two years ago / when we last talked to you on ^date of last interview*]. So if [*^two years ago / when we last talked to you on ^date of last interview*] [*^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

[Don't Know and Refusal are not allowed]

*IF whether can answer questions about participant's memory = continue*

[Heiq = 1]

**HEIQB\*\***

SHOW CARD C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^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 C6

Compared with two years ago, how is [^name] at using 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

END OF FILTER

## Pain

## HEPAIN

Are you often troubled with pain?

- 1 Yes
- 2 No

*IF whether often troubled with pain = yes*

[HePain = 1]

### HEPAA

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

INTERVIEWER: READ OUT

INTERVIEWER: INCLUDE PEOPLE WHO EXPERIENCE INTERMITTENT PAIN OFTEN.

1. mild,
2. moderate,
3. or, severe

### HEPAWH

#### SHOWCARD C7

In which parts of the body do you feel pain?

INTERVIEWER: CODE ALL THAT APPLY.

1. Back
2. Hips
3. Knees
4. Feet
5. Mouth/teeth
6. Other
7. All over

Description	Variable	Archive
Back	HePaWh1	Hepawba
Hips	HePaWh2	Hepawhi
Knees	HePaWh3	Hepawkn
Feet	HePaWh4	Hepawfe
Mouth/teeth	HePaWh5	Hepawmo
Other	HePaWh6	Hepawot
All over	HePaWh7	Hepawal

*IF pain in back, hips, knees, feet or all over*

[HEPAWH=1,2,3,4, 7]

### 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 rating pain when walking = can't walk*

[HEPab = 2]

### HEPAB1

INTERVIEWER: CHECK WHETHER EVER WALKS ON A FLAT SURFACE – INCLUDE ACROSS THEIR ROOM AT HOME, EVEN IF THEY ONLY WALK VERY SLOWLY. ONLY CODE 1 IF THEY SAY NO.

1. Confirms never walks or cannot walk
2. Does sometimes walk on a flat surface

END OF FILTER  
END OF FILTER

*IF (pain in back OR pain all over) AND walks on a flat surface*  
*[HEPAWH = 1,7] AND [HePab1 =2 OR HEpab=1]*

**HEBCK**

(How would you rate the pain) in your back?

INTERVIEWER: PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

END OF FILTER

*IF (pain in hips OR pain all over) AND walks on a flat surface*  
*[HEPAWH = 2 or 7 AND [HePab1 =2 or Hepab=1]]*

**HEHIP**

(How would you rate the pain) in your hips?

INTERVIEWER: PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

END OF FILTER

*IF (pain in knees OR pain all over) AND walks on a flat surface*  
*[HEPAWH = 3 or 7 AND [HePab1 =2 or Hepab=1]*

**HEKNE**

(How would you rate the pain) in your knees?

INTERVIEWER: PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

END OF FILTER

*IF pain in feet OR pain all over AND walks on a flat surface*  
*[HEPAWH = 4 or 7] AND [HePab1 =2 or HEpab=1]*

**HEFET**

(How would you rate the pain) in your feet?

INTERVIEWER: PROMPT IF NECESSARY: 'Where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine'.

Range: 0..10

END OF FILTER

*IF (knee pain rating is between 1 and 10) AND (type of arthritis = osteoarthritis)*  
*[(HEKne = [1..10]) AND (HeArt=1)]*

*IF (IAskPx[pnum] <> Yes) THEN*

*IF rating pain when walking = continue, don't know or refusal [HEPab = 1, -8, -9]*

**HEBAL**

**SHOWCARD C8**

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

END OF FILTER

*IF reported problems with keeping balance when walking on level surface is always, very often, often, sometimes, never, don't know OR refused [HeBal = 1, 2, 3, 4, 5, -8 (DK) or -9 (Ref)]*

**HEDIZ**

**SHOWCARD C8**

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

END OF FILTER

END OF FILTER

**HEADLA\***

**SHOWCARD C9**

Because of a health problem, [*do you /does he /does she*] have difficulty doing any of the activities on this card? Exclude any difficulties that you expect to last less than three months

INTERVIEWER: PROBE - 'What others?'

INTERVIEWER: CODE ALL THAT APPLY.

- 01 Walking 100 yards
- 02 Sitting for about two hours
- 03 Getting up from a chair after sitting for long periods
- 04 Climbing several flights of stairs without resting
- 05 Climbing one flight of stairs without resting
- 06 Stooping, kneeling, or crouching
- 07 Reaching or extending [*your / his / her*] arms above shoulder level (either arm)
- 08 Pulling or pushing large objects like a living room chair
- 09 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

*[CHECK HE2] CHECK: IF None = activities has difficulties doing (set A) [None = HeADLa]*

*CHECK: activities has difficulties doing (set A).CARDINAL = 1*

*[HeADLa.CARDINAL = 1 ]*

*INTERVIEWER: 'None' is an exclusive code at this question. Please change!*

***[code maximum 10 out of 11 possible responses]***

Description	Variable	Archive
Mobility: difficulty walking 100 yards	HeADLa1	Hemobwa
Mobility: difficulty sitting 2 hours	HeADLa2	Hemobsi
Mobility: difficulty getting up from chair after sitting long periods	HeADLa3	Hemobch
Mobility: difficulty climbing several flights stairs without resting	HeADLa4	Hemobcs
Mobility: difficulty climbing one flight stairs without resting	HeADLa5	Hemobcl
Mobility: difficulty stooping, kneeling or crouching	HeADLa6	Hemobst
Mobility: difficulty reaching or extending arms above shoulder level	HeADLa7	Hemobre
Mobility: difficulty pulling or pushing large objects	HeADLa8	Hemobpu
Mobility: difficulty lifting or carrying weights over 10 pounds	HeADLa9	Hemobli
Mobility: difficulty picking up 5p coin from table	HeADLa10	Hemobpi
Mobility: whether said had none of listed difficulties	HeADLa96	Hemob96

## HEADLB\*

### SHOWCARD C10

Here are a few more everyday activities. Please tell me if [*^you have / ^name] has] 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 /does he /does she] have difficulty doing any of the activities on this card?*

INTERVIEWER: PROBE - 'What others?'

INTERVIEWER: CODE ALL THAT APPLY.

01 Dressing, including putting on shoes and socks

02 Walking across a room

03 Bathing or showering

04 Eating, such as cutting up *^[your / his / her] food*

05 Getting in or out of bed

06 Using the toilet, including getting up or down

07 Using a map to figure out how to get around in a strange place

08 Recognising when you are in physical danger

09 Preparing a hot meal

10 Shopping for groceries

11 Making telephone calls

12 Communication (speech, hearing or eyesight)

13 Taking medications

14 Doing work around the house or garden

15 Managing money, such as paying bills and keeping track of expenses

96 None of these

*[CHECK HE3] CHECK: IF activities has difficulties doing (set B) = None [None = HeADLb]*

*CHECK: activities has difficulties doing (set B).CARDINAL = 1 [HeADLb.CARDINAL = 1]*

INTERVIEWER: 'None' is an exclusive code at this question. Please change!

***[code maximum 13 out of 14 possible responses]***

Description	Variable	Archive
ADL: difficulty dressing, including putting on shoes and socks	HeADLb1	Headldr
ADL: difficulty walking across a room	HeADLb2	Headlwa
ADL: difficulty bathing or showering	HeADLb3	Headlba

ADL: difficulty eating, such as cutting up food	HeADLb4	Headlea
ADL: difficulty getting in and out of bed	HeADLb5	Headlbe
ADL: difficulty using the toilet, including getting up or down	HeADLb6	Headlwc
IADL: difficulty using map to figure out how to get around strange place	HeADLb7	Headlma
IADL: difficulty recognising when in physical danger	HeADLb8	Headlda
IADL: difficulty preparing a hot meal	HeADLb9	Headlpr
IADL: difficulty shopping for groceries	HeADLb10	Headlsh
IADL: difficulty making telephone calls	HeADLb11	Headlph
IADL: difficulty with communication (speech, hearing or eyesight)	HeADLb12	Headlsp
IADL: difficulty taking medications	HeADLb13	Headlme
IADL: difficulty doing work around house and garden	HeADLb14	Headlho
IADL: difficulty managing money, eg paying bills, keeping track expenses	HeADLb15	Headlmo
ADL&IADL: whether said had none of listed difficulties	HeADLb96	Headl96

## THE SOCIAL CARE MODULE IS NOW ROUTED

See separate documentation

### Smoking

*IF whether ever smoked cigarettes at Last interview = No, NA, DK, REF, empty*  
*[[ff\_HeSmk =No, 9991, 9998, 9999, EMPTY]*

#### **HESMK\***

*[^Have you/ Has [^name]] ever smoked cigarettes?*

INTERVIEWER: EXCLUDE e-cigarettes (electronic cigarettes)

1. Yes
2. No

END OF FILTER

*IF (whether ever smoked cigarettes = yes) OR (whether ever smoked cigarettes at Last interview =yes)*

*[[IF (HeSmk = Yes) OR (IFFW[PNum].HeSmk = Yes) OR | (IAskpx[Pnum] = Yes)]*

#### **HESKA\***

*[^Do you / Does [^name]] smoke cigarettes at all nowadays?*

INTERVIEWER: EXCLUDE e-cigarettes (electronic cigarettes)

1. Yes
2. No

END OF FILTER

*IF (whether smoked cigarettes at Last interview = yes) AND (whether smokes cigarettes now = no)*

*[[IF (ff\_HeSka = Yes AND HeSka = No) AND (IAskpx[Pnum] <> Yes)]*

#### **HESKD**

The last time we interviewed you *[^on date of last interview]*, you said that you were smoking at that time.

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD.

1. Yes
2. No, respondent has never smoked

*IF whether smoking at last interview = yes*  
*[HeSkd = 1]*

**HESKF**

INTERVIEWER: PROBE AS REQUIRED AND CODE RESPONSE GIVEN BY RESPONDENT.

INTERVIEWER: EXCLUDE e-cigarettes (electronic cigarettes)

1. Does smoke cigarettes nowadays
2. Stopped smoking cigarettes since last interview

END OF FILTER

*IF (reason smoking disputed = stopped smoking ) OR (whether smokes now = stopped smoking)*  
*[HeSke = 3 OR HeSkf = 2]*

**HESTOP**

**SHOWCARD C24**

What was the main reason that you stopped smoking cigarettes?

- 01 Doctor or nurse said I should stop
- 02 It is unhealthy
- 03 It is expensive / to save money
- 04 Pressure from family or friends
- 05 Worried about effect of passive smoke on people around me
- 06 Stopped enjoying it
- 07 Cosmetic reasons (e.g. smell, stained teeth, fingers, hair)
- 08 It's becoming harder to smoke in public or at work
- 09 Advertising
- 95 Other (SPECIFY)

*IF reason for quitting smoking = other*  
*[Hestop = 95]*

**HESTOPA**

INTERVIEWER: Enter other reason given for stopping smoking.  
String 30

***[Open responses to HESTOPA were coded and then incorporated into HESTOP.]***

END OF FILTER

END OF FILTER

END OF FILTER

*IF whether smokes cigarettes nowadays = yes OR whether smokes now = does smoke cigarettes [(HESka = 1) OR (HESkf = 1)]*

**HECIG**

Do you smoke cigarettes or roll ups?

INTERVIEWER: EXCLUDE e-cigarettes (electronic cigarettes)

1. Cigarettes

2. Roll ups
3. Both cigarettes and roll-ups

*IF whether smokes cigarettes or roll ups = cigarettes, both*

*[HECig = 1, 3]*

**HESKB**

About how many cigarettes a day do you usually smoke on weekdays?

INTERVIEWER: If range given and can't estimate, enter mid-point.

INTERVIEWER: EXCLUDE e-cigarettes (electronic cigarettes)

If less than one a day, enter 0.

Range: 0..997

**HESKC**

About how many cigarettes a day do you usually smoke at weekends?

INTERVIEWER: If range given and can't estimate, enter mid-point.

If less than one a day, enter 0.

INTERVIEWER: EXCLUDE e-cigarettes (electronic cigarettes)

Range: 0..997

*[CHECK HE4] CHECK: IF number of cigarettes smoked on weekday is 200 or more*

*[HeSkb >= 200 ]*

INTERVIEWER: This is more than 200 a day. Please change.

*[CHECK HE5] SIGNAL: IF number of cigarettes smoked on weekday is 60 or more*

*[HeSkb . = 60 ]*

INTERVIEWER: This seems high (^heskb). Please check.

*[CHECK HE6] CHECK: IF number of cigarettes smoked a day at weekends is 200 or more*

*[HeSkc >= 200 ]*

INTERVIEWER: This is more than 200 a day. Please change.

*[CHECK HE7] SIGNAL: IF number of cigarettes smoked a day at weekends is 60 or more*

*[HeSkc >= 60 ]*

INTERVIEWER: This seems high (^heskc). Please check.

END OF FILTER

*IF whether smokes cigarettes or roll ups = roll ups, both*

*[HECig = 2, 3]*

**HETBA**

How much tobacco do you normally smoke on a weekday?

INTERVIEWER: Code how answer is given.

1. Grams
2. Ounces

**HETBB**

(How much tobacco do you normally smoke on a weekday?)

INTERVIEWER: Enter amount.

Range: 0..997

*[CHECK SC1] SIGNAL: IF smokes more than 4 ounces of tobacco a day during weekdays.*

*IF(HETba = Ounces) AND (HETbb > 4)*

INTERVIEWER: This seems high (^hetbb ^hetba). Please check.

*[CHECK SC2] SIGNAL: IF smokes more than 120 grams of tobacco a day during weekdays*

*IF (hetba= Grams) AND (HETbb>120)*

INTERVIEWER: This seems high (^hetbb ^hetba). Please check.

### **HETBC**

How much tobacco do you normally smoke a day at weekends?

INTERVIEWER: Code how answer is given.

1. Grams
2. Ounces

### **HETBD**

(How much tobacco do you normally smoke a day at weekends?)

INTERVIEWER: Enter amount.

Range: 0..997

*[CHECK SC3] CHECK: IF (HETbd = RESPONSE) THEN CHECK (HETbd <= 200)*

INTERVIEWER: This is more than 200 a day. Please change.

*[CHECK SC4] SIGNAL: IF smokes more than 4 ounces of tobacco a day on weekend days.*

*IF(HETba = Ounces) AND (HETbb > 4)*

INTERVIEWER: This seems high (^hetbd ^hetbc). Please check.

*[CHECK SC5] SIGNAL: IF smokes more than 120)grams of tobacco a day on weekend days*

*IF (hetba= Grams) AND (HETbb>120)*

INTERVIEWER: This seems high (^hetbd ^hetbc). Please check.

END OF FILTER

### **HECGSTP**

Has a doctor or nurse ever advised you to stop smoking?

1. Yes
2. No

*IF whether doctor / nurse advised to stop smoking = yes*

*[Hecgstp = 1]*

### **HECGSTA**

Did you stop for more than 6 months as a result of this advice?

1. Yes
2. No

END OF FILTER

END OF FILTER

### **HEECIG**

Have you ever used an e-cigarette (electronic cigarette)?

INTERVIEWER, READ OUT IF NEEDED: By 'e-cigarette' we mean a hand held vaping device that the user inhales, producing a vapour that may or may not contain nicotine. This could be a 'pen-style' device, pod, modifiable tank or disposable product

- 1 Yes
- 2 No

*If ever used an e-cigarette (HECIG = yes)*

**HEECIG3**

**SHOWCARD C25**

**How often on average did you use an e-cigarette over the last 3 months?**

- 1 Once a month or less
- 2 On 2-4 days a month
- 3 On 2-4 days a week
- 4 On 5-6 days a week
- 5 Daily
- 6 Not used an e-cigarette in the last 3 months

*If used e-cigarette in last 3 months (HEECIG3 = 1, 2, 3, 4 or 5)*

**HEECIGNIC**

Does the electronic cigarette or vaping device you mainly use contain nicotine?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

## Physical activity

**HEACTA\***

**SHOWCARD C26**

We would like to know the type and amount of physical activity involved in [<sup>^</sup>your / name's] daily life. [<sup>^</sup>Do you / Does he or she] take part in sports or activities that are **vigorous**...

INTERVIEWER: 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\***

**SHOWCARD C26**

And [<sup>^</sup>do you / does he or she] take part in sports or activities that are **moderately energetic**...

INTERVIEWER: 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\***

**SHOWCARD C26**

And [<sup>^</sup>do you / does he or she] take part in sports or activities that are **mildly energetic**...

INTERVIEWER: READ OUT

- 1. ..more than once a week,

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

**Note: for females, the female health module is routed in at this point after the physical activity module. Please see separate female health spec.**

**HEGPOFT\***

During the four weeks ending yesterday, did [**^you/[^name]**] talk to a family doctor (GP) about [**^your/his/her**] own health either in person or by telephone?

- 1 Yes
- 2 No

*IF talked to a family doctor in last 4 weeks = yes*

| [**HeGPOft = 1**]

**HEGPNHS\***

Thinking of the last time [**^you/[^name]**] talked to a doctor, was this consultation ...

INTERVIEWER: Read out ...

- 1 ...Under the National Health Service,
- 2 Or, paid for privately?

END OF FILTER

**HETSET\* @**

INTERVIEWER: The Health section is finished.

Please enter <1> here to make the program store the current time and date.



# 1 - SOCIAL CARE (CA)

*Note: Refreshment indicator (Refresh) is no longer at the household level but at the individual level and the variable is called RefreshIV. The derivation for RefreshIV is as follows:*

*If Cohort<10, RefreshIV = No*

*If Cohort=10 and IVout<30, RefreshIV = NO*

*If Cohort=10 and IVout=>30, RefreshIV = YES*

*If Cohort=11, RefreshIV = Yes*

*If reported at least one difficulty with an ADL or IADL at Headla or Headlb*

*[(Headla= a<>96 or Headlb<>96)] AND NOT currently living in an institution*

## **CATINT\***

I have just asked about difficulties [^you/^[^name]] may have with some activities. I'd now like to ask about any help [^you/^[^name]] [^have/has] received in the last month, even if [^you/^[^name]] [ ^do/does] not usually need any help.

Please only think about help [^you/^[^name]] [^have/has] received because of a physical, mental, emotional or memory problem.

INTERVIEWER: Press 1 and <Enter> to continue.

## **CATKA\***

[^Have/Has] [^you/^[^name]] received help from anyone with walking 100 yards, in the last month?

INTERVIEWER: INCLUDE HELP EVEN IF IT WAS FOR A SHORT TIME OR PROVIDED BY HUSBAND / WIFE / ANOTHER FAMILY MEMBER.

- 1 Yes
- 2 No

## **CATKB\***

What about climbing several flights of stairs without resting?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/^[^name]] received help from anyone with climbing several flights of stairs without resting, in the last month?

- 1 Yes
- 2 No

## **CATKC\***

What about climbing one flight of stairs without resting?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/^[^name]] received help from anyone with climbing one flight of stairs without resting, in the last month?

- 1 Yes
- 2 No

## **CATKD\***

What about dressing, including putting on shoes and socks?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/^[^name]] received help from anyone with dressing, including putting on shoes and socks, in the last month?

- 1 Yes
- 2 No

**CATKE\*** What about walking across a room?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with walking across a room, in the last month?

- 1 Yes
- 2 No

**CATKF\***

What about bathing or showering?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with bathing or showering, in the last month?

- 1 Yes
- 2 No

**CATKG\***

What about eating, such as cutting up food?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with eating, such as cutting up food, in the last month?

- 1 Yes
- 2 No

**CATKH\***

What about getting in or out of bed?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with getting in or out of bed, in the last month?

- 1 Yes
- 2 No

**CATKI\***

What about using the toilet, including getting up or down?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with using the toilet, including getting up or down, in the last month?

- 1 Yes
- 2 No

**CATKJ\***

What about shopping for groceries?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with shopping for groceries, in the last month?

- 1 Yes
- 2 No

**CATKK\***

What about taking medications?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with taking medications, in the last month?

- 1 Yes
- 2 No

**CATKL\***

What about doing work around the house or garden?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with doing work around the house or garden, in the last month?

- 1 Yes
- 2 No

**CATKM\***

What about managing money, such as paying bills and keeping track of expenses?

INTERVIEWER: EXPLAIN IF NECESSARY: Include help even if it was for a short time or provided by husband/ wife/ another family member.

INTERVIEWER: ASK IF NECESSARY: [^Have/Has] [^you/[^name]] received help from anyone with managing money, such as paying bills and keeping track of expenses, in the last month?

- 1 Yes
- 2 No

END OF FILTER

**CATNOB\***

Computed: Number of activities respondent has received help within the last month excluding j l m (shopping, housework, managing money)

0..97

*IF number of activities respondent has received help with excluding shopping, housework or managing money (computed) = 0*

AND

*(help with shopping = yes OR help with work around house/garden = yes OR help with managing money = yes)*

*[(CaTNoB = 0) AND ((CaTkJ = 1) OR (CaTkL = 1) OR (CaTkM = 1))]*

**CATCH\***

[^Do/Does] [^you/[^name]] receive this help with [^shopping for groceries/doing work around the house or garden/managing money] because of a physical, mental, emotional or memory problem?:

- 01 Yes for some or all
- 02 No, none of this help is because of a physical, mental, emotional or memory problem

END OF FILTER

*IF derived number of activities respondent received help within the last month >0 AND whether receive help due to a physical/mental/emotional or memory condition = yes*

*[(CaTNo > 0) AND (CaTCh = 1 or -8 or -9)]*

**CAWIN\***

I am now going to ask you some questions about who helps [^you/[^name]] with different things. I will show you two lists of people who may have helped [^you/[^name]].

1. Press <1> and <Enter> to continue.

LOOP FOR EACH RELEVANT ACTIVITY SET:

(1) MOBILITY

*IF whether has had help walking 100 yards / climbing several flights of stairs without resting / climbing one flight of stairs without resting / walking across a room / getting in or out of bed/ using a toilet = yes*

*[(CaTkA = 1) OR (CaTkB = 1) OR (CaTkC = 1) OR (CaTkE = 1) OR (CaTkH = 1) OR (CaTkI = 1)]*

(2) WASHING

*IF whether has had help dressing / bathing or showering = yes*

*[(CaTkD = 1) OR (CaTkF = 1)]*

(3) EATING

*IF whether has had help eating = yes*

*[CaTkG = 1]*

(4) SHOPPING/ WORK DONE AROUND THE HOUSE

*IF whether has had help shopping for groceries/doing work around the house or garden = yes*

*[(CaTkJ = 1) OR (CaTkL = 1)]*

(5) TAKING MEDICATION

*IF whether has had help taking medication(s) = yes*

*[CaTkK = 1]*

(6) MANAGING MONEY

*IF whether has had help shopping for groceries/doing work around house or garden = yes*

*[CaTkM = 1]*

**CAHIN\***

**SHOWCARD C11**

In the last month, who has helped [^you/[^name]] with [^BLANK/ walking 100 yards/climbing stairs/walking across a room/getting in or out of bed/ using the toilet/ dressing/ bathing or showering/eating/ shopping for groceries/doing work around the house or garden/taking medications/managing money]?

First, please tell me about all of the people from this list who have helped [^you/[^name]].

Please only think about help received because of a physical, mental, emotional or memory problem.

INTERVIEWER: PROBE - 'Does anyone else help with these activities?'

INTERVIEWER: CODE ALL THAT APPLY.

01 Husband/Wife/Partner

02 Son (including step son, adopted son or son in law)

03 Daughter (including step daughter, adopted daughter or daughter in law)

04 Grandchild (including Great Grandchildren)

05 Sister (including step sister, adopted sister or sister in law)

06 Brother (including step brother, adopted brother or brother in law)

07 Other relative

08 Friend

09 Neighbour

96 None of these

*[CHECK SC1] CHECK: IF selects "None of these" AND any other response.*

*[(IF (CAHIN= 96) AND (CAHIN= any 1 to 9))*

*"Did you mean to choose 'None of the above' as well as one of the other codes?  
Please change."*

**CAHFO\***

**SHOWCARD C12**

Now, please tell me about all of the people from this list who have helped  
[*^you/^name*] with [*^BLANK/ walking 100 yards/climbing stairs/walking across a  
room/getting in or out of bed/ using the toilet/ dressing/ bathing or showering/eating/  
shopping for groceries/doing work around the house or garden/taking  
medications/managing money*] in the last month?

INTERVIEWER: PROBE - 'Does anyone else help with these activities?'

INTERVIEWER: CODE ALL THAT APPLY.

- 01 Home care worker/ home help/ personal assistant
- 02 A member of the reablement / intermediate care staff team
- 03 Voluntary helper
- 04 Warden / Sheltered housing manager
- 05 Cleaner
- 06 Council's handyman
- 07 Member of staff at the care/nursing home
- 95 Other - please specify
- 96 None of these

*[CHECK SC2] CHECK: IF selects "None of these" AND any other response.*

*[(IF (CAHFO=96) AND (CAHFO= any 1 to 95))*

*"Did you mean to choose 'None of the above' as well as one of the other codes?  
Please change."*

*IF formal provider = other [CaHFo = 95]*

**CAHFOO\***

Who was the other person that helped [*^you/^name*]?

STRING[100]

END OF FILTER

END OF FILTER

End of loop

If does not receive help from formal provider for all of the activities for which they got  
help [CAHFO=96]

**CAANY\***

In the last two years [*^have/has*] [*^you/^name*] received care at home that was not  
provided by family or friends?

- 1 Yes
- 2 No

If received care at home in last 2 years [CAANY=1]

**CAANYP\***

In the last two years [*^have/has*] [*^you/^name*] had to pay for care received at home  
that was not provided by family or friends?

- 1 Yes
- 2 No | END OF FILTER

**CAHPC\***

Thinking about all the help [^you/he/she] receive(s), would you say that the help [^you/he/she] receive(s)...

INTERVIEWER: READ OUT

- 01 ...Meets [^your/his/her] needs all the time,
- 02 usually meets [^your/his/her] needs,
- 03 sometimes meets [^your/his/her] needs,
- 04 or, hardly ever meets [^your/his/her] needs?

END OF FILTER

LOOP FOR ALL INFORMAL CARE GIVERS FROM CAHIN WHO PROVIDE HELP EXCEPT NEIGHBOUR/OTHER CARE GIVERS

(IF care giver = husband/wife/partner, son(s), daughter(s), grandchild(ren), sister(s), brother(s), other relative(s), friend(s)) [IF loop:= 1 to 7]

**CAFAM\***

You have told me that [^your/his/her] [^husband /wife /partner /son /other son /daughter /other daughter /grandchild /other grandchild /sister /other sister /brother /other brother / other relative/ friend/ other friend] helped [^you/[^name]].

Can I just check, does this person live in the same household as [^you/[^name]]?

- 01 Yes
- 02 No

IF whether care giver lives in household = yes

[CaFam = 1]

**CAPNO\***

Please enter person number of the person who helps [^you/[^name]]?

Household Member 01 to 16

*[CHECK SC3] CHECK: IF person number specified does not correspond to the person number of anyone in the household.*

This code is not valid for this question.

*[CHECK SC4] CHECK: IF the person number specified corresponds to the participant's person number*

This code is the respondent - please change!

*[CHECK SC5] CHECK: IF the person number specified has already been specified for someone else.*

Already had this person - please change!

END OF FILTER

END OF FILTER

IF whether care giver lives in household <> yes

[CaFam <> 1]

**CANAM\***

[^You have told me that [^your /his /her] [^husband /wife /partner /son /other son /daughter /other daughter /grandchild /other grandchild /sister /other sister /brother /other brother / other relative/ friend / other friend/ neighbour /other neighbour] helped [^you/[^name]]. What is [^your /his /her] [^husband's /wife's /partner's /son's /other son's /daughter's /other daughter's /grandchild's /other grandchild's /sister's / other sister's /brother's /other brother's / other relative's / friend's / other friend's / neighbour's /other neighbour's] name?

STRING[20]

*IF care giver sex not implied in the category = grandchild, relative, friend, neighbour or other care giver [if loop: 4, 7, 8, 9]*

**CASEX\***

INTERVIEWER: CODE OR ASK SEX OF PERSON WHO HELPS

01 Male

02 Female

Description	Variable	Archive
Gender of person who helps: Husband/Partner	CaSex	CaSex
Gender of person who helps: Son A	CaSex2	CaSex2
Person Number of person who helps: Son B	CaSex3	CaSex3
Gender of person who helps: Son C	CaSex4	CaSex4
Person Number of person who helps: Daughter A	CaSex5	CaSex5
Gender of person who helps: Daughter B	CaSex6	CaSex6
Gender of person who helps: Daughter C	CaSex7	CaSex7
Gender of person who helps: Grandchild A	CaSex8	CaSex8
Gender of person who helps: Grandchild B	CaSex9	CaSex9
Gender person who helps: Grandchild C	CaSex10	CaSex10
Gender of person who helps: Sister A	CaSex11	CaSex11
Gender of person who helps: Sister B	CaSex12	CaSex12
Gender of person who helps: Sister C	CaSex13	CaSex13
Gender of person who helps: Brother A	CaSex14	CaSex14
Gender of person who helps: Brother B	CaSex15	CaSex15
Gender of person who helps: Brother C	CaSex16	CaSex16
Gender of person who helps: Other relative A	CaSex17	CaSex17
Gender of person who helps: Other relative B	CaSex18	CaSex18
Gender of person who helps: Other relative C	CaSex19	CaSex19
Gender of person who helps: Friend A	CaSex20	CaSex20
Gender of person who helps: Friend B	CaSex21	CaSex21
Gender of person who helps: Friend C	CaSex22	CaSex22
Gender of person who helps: Neighbour A	CaSex23	CaSex23
Gender of person who helps: Neighbour B	CaSex24	CaSex24
Gender of person who helps: Neighbour C	CaSex25	CaSex25

END OF FILTER

END OF FILTER

END OF LOOP

LOOP FOR ALL CARE GIVERS EXCEPT HUSBAND/ WIFE/ PARTNER

*[CAHIN in [2..9]*

**CAMOR\***

Did another [<sup>^</sup>son/ daughter/ grandchild/ sister/ brother/ other relative/ friend/ neighbour] help [<sup>^</sup>you/ [<sup>^</sup>name]]?

01 Yes

02 No

END OF LOOP



*IF formal care provider = home care worker/home help/personal assistant [if mentioned 01 in CAHFO]*

**CAHHA\***

You have told me that a home care worker/home help/personal assistant helped [^you/ [^name]] in the last month.

[^Do/Does] [^you/ [^name]] have just one person helping [^you /him /her], or [^do /does] [^you/ [^name]] have more than one?

01 One,

02 More than one

*IF number of formal providers = more than one*

*[CaHHa=2]*

**CAHHB\***

Do they all help with the same kinds of things, or [^do/does] [^you/[^name]] have different people helping with different things?

01 All help with same kind of things,

02 Different people help with different things

*LOOP FOR UP TO THREE TIMES*

*IF help provided = different people help with different things*

*[CaHHb=2]*

**CAHHC\***

[^FIRST TIME IN THE LOOP: I'd like you to think about the home care workers, home helps or personal assistants who help with different things, so that I can ask you about each of them later. | ^EVERY OTHER TIME IN THE LOOP: BLANK]

Thinking of the [^first/second/third] home care worker / home help / personal assistant, what sort of things do they help [^you/[^name]] with?

INTERVIEWER: CODE MAIN TASK

01 Getting up in the morning,

02 Going to bed,

03 Washing/ bathing/ personal care (e.g. dressing, toileting),

04 Meals/ eating,

05 Getting out of the house/ shopping,

06 Cleaning/ laundry,

07 Other

*[CHECK SC6] CHECK: IF answer given in a loop has already been given in a previous loop*

*[If (CAHHC Loop 3= Loop 1 or Loop 2) OR Loop 2= loop 1]*

*IF yes - SELECT MAIN TASK*

*IF no - please change*

**CAHHD\***

Are there any more home care workers, home helps or personal assistants who help [^you/[^name]] with different kinds of things?

1 Yes

2 No

If CAHHD=1

**CAHHC (Loop 3)**

Thinking of the [^third] home care worker / home help / personal assistant, what sort of things do they help [^you/[^name]] with?

INTERVIEWER: CODE MAIN TASK

01 Getting up in the morning,



- 02 Going to bed,
- 03 Washing/ bathing/ personal care (e.g. dressing, toileting)
- 04 Meals/ eating,
- 05 Getting out of the house/ shopping,
- 06 Cleaning/ laundry,
- 07 Other

**[CHECK SC7] CHECK:** IF response in new loop is the same as a response given in a previous loop

IF Loop 4 = loop 1 loop2 or loop3]

[^lddoes[pno] ^youname[pno] have different people helping with different things?

IF yes - SELECT MAIN TASK

IF no - please change

END OF LOOP

END OF FILTER

END OF FILTER

**LOOP FOR EACH CARE GIVER WHO PROVIDES HELP:**

IF type of caregiver = formal care providers

[CAHFO in [1..7]

**CAHRF\***

Thinking about [^the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] in the last week how many hours have they helped [^you/[^name]] in person with these kinds of tasks?

INTERVIEWER: EXPLAIN IF NECESSARY: Do not include help over the phone or by internet

INTERVIEWER: IF 2 PEOPLE HELP AT THE SAME TIME, CODE DOUBLE THE HOURS

ENTER NUMBER OF HOURS. IF LESS THAN 1 HOUR ENTER 0.5. IF HELP GIVEN, BUT NOT IN THE LAST WEEK ENTER '0'.

[^BLANK/INTERVIEWER INSTRUCTION: IF home care worker / Personal Assistant or other care staff "live in"/ "sleep in", INCLUDE ALL hours they are on duty.]

IF RESPONDENT DOES NOT GIVE PRECISE ANSWER CODE DK

Press <F9> for help

Do not include occasional errands/odd jobs without the respondent such as picking up glasses or returning library books

**[CHECK SC8] SIGNAL:** IF CaHrF[ploop] >30

"That is a high number of hours. Check this is correct and amend IF necessary"

Description	Variable	Archive
The home care worker / home help / personal assistant A	CaHrF26	CaHrF26
The home care worker / home help / personal assistant B	CaHrF27	CaHrF27
The home care worker / home help / personal assistant C	CaHrF28	CaHrF28

The member of the reablement / intermediate care staff team	CaHrF29	CaHrF29
The voluntary helper	CaHrF30	CaHrF30
The warden / Sheltered housing manager	CaHrF31	CaHrF31
The cleaner	CaHrF32	CaHrF32
The Council's handyman	CaHrF33	CaHrF33
The member of staff at the other care/nursing home	CaHrF34	CaHrF34
Other helper	CaHrF35	CaHrF35

END OF FILTER

*IF CAHRF (hours) not provided for formal provider OR no formal providers so CAHRF not asked [CaHrF= DK or RF or NOT(CAHFO in [1..7])]*

**CAHRI\***

**SHOWCARD C13**

Thinking about [<sup>^</sup>your/his/her] [<sup>^</sup>husband/wife/partner/son/other son/daughter/other daughter/grandchild/other grandchild/sister/other sister/brother/other brother/ other relative/ friend/ other friend/ neighbour/other neighbour/the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] in the last week how many hours have they helped [<sup>^</sup>you/<sup>^</sup>name]] in person with these kinds of tasks?

[<sup>^</sup>BLANK/Please only think about the hours they were helping [<sup>^</sup>you/<sup>^</sup>name]] with these kinds of tasks and not about the time they were around in the house or there to help [<sup>^</sup>you/<sup>^</sup>name]] if [<sup>^</sup>you/he/she] needed it.

INTERVIEWER: EXPLAIN IF NECESSARY: Not help over the phone or by internet or doing occasional errands or odd jobs without the respondent

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours

IF 2 PEOPLE HELP AT THE SAME TIME, CODE DOUBLE THE HOURS

[<sup>^</sup>BLANK/INTERVIEWER INSTRUCTION: IF home care worker / Personal Assistant or other care staff "live in"/ "sleep in", INCLUDE ALL hours they are on duty.]

Press <F9> for help

Do not include occasional errands/odd jobs without the respondent such as picking up glasses or returning library books

01 No help in the last week,

02 Less than one hour,

03 1-4 hours,

04 5-9 hours,

05 10-19 hours,

06 20-34 hours,

07 35-49 hours,

08 50-99 hours,

09 100 hours or more

Description	Variable	Archive
Husband/wife/partner	CaHrI01	CaHrI01
Son A	CaHrI02	CaHrI02
Son B	CaHrI03	CaHrI03
Son C	CaHrI04	CaHrI04
Daughter A	CaHrI05	CaHrI05
Daughter B	CaHrI06	CaHrI06
Daughter C	CaHrI07	CaHrI07

Grandchild A	CaHrI08	CaHrI08
Grandchild B	CaHrI09	CaHrI09
Grandchild C	CaHrI10	CaHrI10
Sister A	CaHrI11	CaHrI11
Sister B	CaHrI12	CaHrI12
Sister C	CaHrI13	CaHrI13
Brother A	CaHrI14	CaHrI14
Brother B	CaHrI15	CaHrI15
Brother C	CaHrI16	CaHrI16
Other relative A	CaHrI17	CaHrI17
Other relative B	CaHrI18	CaHrI18
Other relative C	CaHrI19	CaHrI19
Friend A	CaHrI20	CaHrI20
Friend B	CaHrI21	CaHrI21
Friend C	CaHrI22	CaHrI22
Neighbour A	CaHrI23	CaHrI23
Neighbour B	CaHrI24	CaHrI24
Neighbour c	CaHrI25	CaHrI25
The home care worker	CaHrI26	CaHrI26
home help	CaHrI27	CaHrI27
personal assistant	CaHrI28	CaHrI28
the member of the reablement / intermediate care staff team	CaHrI29	CaHrI29
the voluntary helper	CaHrI30	CaHrI30
The warden / Sheltered housing manager	CaHrI31	CaHrI31
The cleaner	CaHrI32	CaHrI32
The Council's handyman	CaHrI33	CaHrI33
The member of staff at the other care/nursing home	CaHrI34	CaHrI34
Other helper	CaHrI35	CaHrI35

*IF number of hours help provided = DK, RF  
[CaHrI=DK OR CaHrI=RF]*

**CAHRG\***

Can you tell me whether in the last week [^your/his/her] [^husband/wife/partner/son/other son/daughter/other daughter/grandchild/other grandchild/sister/other sister/brother/other brother/ other relative/ friend/ other friend/ neighbour/other neighbour/the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] helped [^you/[^name]] in person with these tasks for:

INTERVIEWER: READ OUT

- 01 Less than 20 hours,
- 02 20-34 hours,
- 03 Or, for 35 hours or more?

Description	Variable	Archive
Husband/wife/partner	CaHrG01	CaHrG01
Son A	CaHrG02	CaHrG02
Son B	CaHrG03	CaHrG03
Son C	CaHrG04	CaHrG04
Daughter A	CaHrG05	CaHrG05
Daughter B	CaHrG06	CaHrG06
Daughter C	CaHrG07	CaHrG07
Grandchild A	CaHrG08	CaHrG08

Grandchild B	CaHrG09	CaHrG09
Grandchild C	CaHrG10	CaHrG10
Sister A	CaHrG11	CaHrG11
Sister B	CaHrG12	CaHrG12
Sister C	CaHrG13	CaHrG13
Brother A	CaHrG14	CaHrG14
Brother B	CaHrG15	CaHrG15
Brother C	CaHrG16	CaHrG16
Other relative A	CaHrG17	CaHrG17
Other relative B	CaHrG18	CaHrG18
Other relative C	CaHrG19	CaHrG19
Friend A	CaHrG20	CaHrG20
Friend B	CaHrG21	CaHrG21
Friend C	CaHrG22	CaHrG22
Neighbour A	CaHrG23	CaHrG23
Neighbour B	CaHrG24	CaHrG24
Neighbour c	CaHrG25	CaHrG25
The home care worker	CaHrG26	CaHrG26
home help	CaHrG27	CaHrG27
personal assistant	CaHrG28	CaHrG28
the member of the reablement / intermediate care staff team	CaHrG29	CaHrG29
the voluntary helper	CaHrG30	CaHrG30
The warden / Sheltered housing manager	CaHrG31	CaHrG31
The cleaner	CaHrG32	CaHrG32
The Council's handyman	CaHrG33	CaHrG33
The member of staff at the other care/nursing home	CaHrG34	CaHrG34
Other helper	CaHrG35	CaHrG35

END OF FILTER

END OF FILTER

END OF LOOP

**LOOP FOR UP TO TWO CAREGIVERS WHO PROVIDE THE RESPONDENT WITH THE MOST HOURS OF CARE**

*IF top care givers providing the most hours of care = RESPONSE [if number of highest carer hours computed based on CAHRF, CAHRI, CAHRG = 1..97]*

**CAHPF\***

**SHOWCARD C14**

Still thinking only about help received in person, how often does

*[[^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/the other helper] usually help [^you/[^name]]?*

INTERVIEWER: EXPLAIN IF NECESSARY: Not help over the phone or by internet

01 Every day

02 Four to six times a week

03 Two or three times a week

04 Once a week

- 05 Once a fortnight/ every two weeks
- 06 Once a month
- 07 Less than once a month

Description	Variable	Archive
Caregiver who provides most hours of care A	CaHpF	CaHpF
Caregiver who provides most hours of care B	CaHpF2	CaHpF2

*IF top provider = the home care worker/home help/personal assistant, the member of the reablement, intermediate care staff team, the voluntary helper, the member of staff at the care/nursing home (formal providers except cleaners, handymen, other helpers) AND how often caregiver provides help = every day, two or three times a week  
 ([computed top provider = CAHFO categories 1..4, 7]) AND (CaHpF =1..3)]*

**CAHPD\***

**SHOWCARD C15**

On the days [[^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] helps [^you/[^name]], how many times a day does he/she usually help [^you/[^name]]?

INTERVIEWER: IF VARIES FROM DAY TO DAY, ASK RESPONDENT TO ANSWER FOR THE MOST COMMON PATTERN

- 01 once a day
- 02 twice a day
- 03 three or four times a day
- 04 all the time
- 05 whenever I need it?

Description	Variable	Archive
Caregiver who provides most hours of care A	CaHpD	CaHpD
Caregiver who provides most hours of care B	CaHpD2	CaHpD2

END OF FILTER

*IF provider is any informal provider or formal provider apart from cleaners, handymen, other helpers [if provider <> CAHFO in [5,6, 95]]*

**CAHPW\***

**SHOWCARD C16**

Still thinking about help received in person, when does [[^BLANK/your/his/her/] [^husband/wife/partner/son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] help [^you/[^name]]?

INTERVIEWER: EXPLAIN IF NECESSARY: Not help over the phone or by internet.

INTERVIEWER: EXPLAIN IF NECESSARY: Help with going to bed or getting up is daytime help.

- 01 During the day time only, until [^you/[^name]] [^go/goes] to bed,
- 02 During the night time only, once [^you/[^name]] [^have/has] gone to bed,

03 Or both during the day time and at night after [^you/^[^name]][^have/has] gone to bed?

Description	Variable	Archive
Caregiver who provides most hours of care A	CaHpW	CaHpW
Caregiver who provides most hours of care B	CaHpW2	CaHpW2

END OF FILTER

END OF FILTER

END OF LOOP

*IF formal providers = yes OR hours of informal care = yes, 20 hours+ from an individual provider*

*[if CAHFO in 1..95 OR highest computed care hrs > 20]*

**CAPYI\***

Now I am going to ask you a few questions about paying for the care [^you/^[^name]] receive(s).

Press <1> and <Enter> to continue.

**CAWDA\***

[^Do/Does] [^you/^[^name]] usually deal with paying for [^your/his/her] care or does a family member or friend manage this for [^you/^[^name]]?

INTERVIEWER: CODE RESPONDENT ANSWER:

01 Deals with this all [^your/him/herself]

02 Deals with some of it but not all

03 Does not deal with this at all

*IF payment for care = dealt with to some extent by respondent, not dealt with by respondent*

*[CaWDa =2,3]*

**CAWDB\***

INTERVIEWER: ASK RESPONDENT WHETHER THE PERSON WHO DEALS WITH PAYMENTS IS CURRENTLY AT HOME AND COULD ASSIST WITH THIS SECTION (IF THE RESPONDENT WISHES). USE DISCRETION TO DECIDE WHETHER THIS IS APPROPRIATE. IF THIS PERSON IS AVAILABLE, CONTINUE WITH THIS SECTION ADDRESSING QUESTIONS TO RESPONDENT AND THE PERSON THEY HAVE CHOSEN. IF NO-ONE IS AVAILABLE CONTINUE WITH THIS SECTION WITH THE RESPONDENT ALONE.

Press <1> and <Enter> to continue.

END OF FILTER

**CADP\***

**SHOWCARD C17**

Local authorities/council/social services offer different ways of arranging payment for people's care. This card describes some of these ways. Please look at the card and tell me whether either of these apply for the care [^you/^[^name]] receive(s)?

INTERVIEWER: ONLY INCLUDE PAYMENTS FOR SOCIAL CARE. DO NOT INCLUDE OTHER PAYMENTS, FOR EXAMPLE PENSION OR ATTENDANCE ALLOWANCE.

INTERVIEWER: IF RESPONDENT SELECTS ONLY ONE ANSWER (1 OR 2)

PROBE FOR THE OTHER ONE: Does the other one also apply?

CODE ALL THAT APPLY (1 AND 2 CAN BE CODED TOGETHER, 3 CAN ONLY BE CODED ON ITS OWN).

- 01 Direct payments
- 02 Local authority/council/social services manages the money
- 03 Neither of these

**[CHECK SC9] CHECK:** IF selects "Neither of these" and any other answer.  
 [IF (CADP=1 OR CADP=2 ) AND (CADP =3)].

"Neither" is an exclusive code at this question. Please change!"

Description	Variable	Archive
Direct payments	CaDP1	CaDP1
Local authority/council/social services manages the money	CaDP2	CaDP2
Neither of these	CaDP3	CaDP3

**CAPB\***

[^Do/Does] [^you/[^name]] have a **Personal Budget**, sometimes known as an **Individual Budget**? This is when the local authority/ council/social services decides the amount or pot of money necessary to meet social care needs. [^You/He/She] can choose how to spend this money which can be used for a range of services, not just social care.

INTERVIEWER: EXPLAIN IF NECESSARY: The money could be paid to [^you/[^name]] as a Direct Payment or the local authority/ council/social services could manage the money for [^you/him/her].

- 01 Yes, have Personal Budget/Individual budget
- 02 No, do not have Personal Budget/ Individual Budget

**CAINA\***

Has the local authority/council made an assessment of what [^you/[^name]] can afford for any of [^your/his/her] care needs?

This is sometimes called an **income assessment** or **means testing**.

INTERVIEWER: EXPLAIN IF NECESSARY: This might have been when the local authority/council was organising care services or arranging a Direct Payment for [^your/his/her] care.

- 01 Yes, had income assessment
- 02 No

END OF FILTER

LOOP FOR EACH FORMAL PROVIDER, ASKED SEPARATELY FOR HOMECARE WORKERS

IF any formal providers= yes [CAHFO in [1..95]]

**CAARR\***

**SHOWCARD C18**

How was the help from [[^BLANK/your/his/her] [^home care worker/ home help/ personal assistant/ member of the reablement / intermediate care staff team/ voluntary helper/ warden / sheltered housing manager/ cleaner/the council's handyman/the member of staff from the care/nursing home/other helper] arranged?

Please look at this card and tell me which option applies.

- 01 Arranged without involvement from the local authority, council or social services,
- 02 Local authority, council or social services arranged this help,
- 03 Local authority, council or social services told [^you/him/her] about the help but [^you/he/she] arranged it or [^your/his/her] family arranged it



04 Other

END OF FILTER

END OF LOOP

LOOP UP TO TWO TIMES FOR EACH RESPONDENT (using two of three loops):  
*Loop 1 (Route A) = IF Local authority involved in arranging care: who arranged help = council, self [CaaRr = 2,3 . Loop 1 asked for one or multiple providers arranged by local authority*

*Loop 2 (Route B) = IF Local Authority not involved in arranging care: who arranged help <> council, self OR Informal providers provide 20 hrs + of care in the last week [CaAsk = Response]. Loop 2 only asked about individual providers where LA not involved in arranging that care*

*CAAsk1 indicates which type of provider is referred to in Loop 2 of payment questions:*

(1-Husb/Wife/Partner; 2-Son A; 3-Son B; 4-Son C; 5-Daughter A; 6-Daughter B; 7-Daughter C; 8-Grandchild A; 9-Grandchild B; 10-Grandchild C; 11-Sister A; 12-Sister B; 13-Sister C; 14-Brother A; 15-Brother B; 16-Brother C; 17-Other relative A; 18-Other relative B; 19-Other relative C; 20-Friend A; 21-Friend B; 22-Friend C; 23-Neighbour A; 24-Neighbour B; 25-Neighbour C; 26-Home care worker/ home help/ personal assistant A; 27-Home care worker/ home help/ personal assistant B; 28-Home care worker/ home help/ personal assistant C; 29-A member of the reablement / intermediate care staff team; 30-Voluntary helper; 31-Warden / Sheltered housing Manager; 32-Cleaner; 33-Council's handyman; 34-Member of staff at the care/nursing home; 35-Other - please specify.)

*Loop 3 (Route B) = asked once if Loop 1 not asked AND if there are eligible providers (formal providers not arranged by local authority or informal providers giving 20+ hours per week)*

*[(CaAsk[2]=response) and (CaRA<>yes)] Loop 3 only asked about individual providers where LA not involved in arranging that care. Only asked if Loop 1(Route A) not asked.*

*CaAsk2 indicates which type of provider is referred to in Loop 3 of payment questions.*

*Same categories as CAAsk1.*

#### **CAPAY\***

*[^Do/Does] [^you/^name]] [^your/his/her partner] pay or give any money for the help given by [^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]? Please include any payments made for this care, even if not made directly to the care provider.*

*^Do not include gifts, treats or occasional payments of expenses such as petrol money or lunch (informal providers only).*

01 Yes,

02 No,

03 Don't know

*IF pays or gives money*

*[CaPay = Yes]*

**CAPFQ\***



How much money [^do/does] [^you/[^name]] [^your/his/her partner] pay for the help given by [^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]. Please include any payments made for this care, even if not made directly to the care provider?

INTERVIEWER: RECORD REFERENCE PERIOD GIVEN BY RESPONDENT.  
RECORD AMOUNT AT NEXT QUESTION.

- 01 per hour
- 02 per visit
- 03 per day
- 04 per week
- 05 per fortnight
- 06 per four weeks
- 07 per calendar month
- 08 per year

*IF frequency of payment = RESPONSE [CaPFq = RESPONSE]*

**CAPAM\***

INTERVIEWER: ENTER AMOUNT IN POUNDS AND PENCE  
: 1.00..999997.00

END OF FILTER

*IF frequency of payment = NONRESPONSE OR payment amount = NONRESPONSE  
[(CaPFq = NONRESPONSE) OR (CaPAm = NONRESPONSE)]*

*IF frequency of payment = per hour [CaPFq = 1]*

**CAPYAB\***

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£3, £5, £8, £12,)

END OF FILTER

*IF frequency of payment = per visit, per day [CaPFq =2,3]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£5, £10, £20, £30)

END OF FILTER

*IF frequency of payment = per week [CaPFq =4]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£10, £25, £40, £100)

END OF FILTER

*IF frequency of payment = per fortnight [CaPFq =5]*

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (£20, £50, £80, £200)

END OF FILTER

*IF frequency of payment = four weeks, calendar month [CaPFq =6,7]*

Was it less than [^amount], more than [^amount] or what?

BRACKETS (£40, £100, £150, £400)

END OF FILTER

*IF frequency of payment = per year [CaPFq =8]*

Was it less than [^amount], more than [^amount] or what?

BRACKETS (£500, £1000, £2000, £5000)

END OF FILTER

*IF frequency of payment = DK or RF [CaPFq = DK or RF]*

Was it less than [^amount], more than [^amount] or what?

BRACKETS (£40, £100, £150, £400)

END OF FILTER

END OF FILTER

### **CAPAI\***

You said [^you/^Name] pay(s) [^amount] [^per hour/per visit/per day/per week/per fortnight/ per four weeks/per calendar month/ per year] for the care provided by [[^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]?

Does this payment cover all the cost of this help or some of the cost of this help?

INTERVIEWER: EXPLAIN IF NECESSARY: the payment for

[[^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper].

01 All

02 Some

### **CAPHW\***

#### **SHOWCARD C19**

How [^do/does] [^you/name] usually pay or give money to [[^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] for helping [^you/him/her]?

INTERVIEWER: CODE ALL THAT APPLY

[^I/He/She] use(s) money from:

01 Own personal income, savings, pension or benefit (such as Attendance Allowance),

02 Direct Payment/ Personal or Individual Budget from the Local Authority/ council/ Social Services,

03 From another source

Description	Variable	Archive
Own personal income, savings, pension or benefit (such as Attendance Allowance: Loop 1	CaPHw1	CaPHwOI
Direct Payment/ Personal or Individual Budget from the Local Authority/ council/ Social Services: Loop 1	CaPHw2	CaPHwDP
Other source: Loop 1	CaPHw3	CaPHwOt
Own personal income, savings, pension or benefit (such as Attendance Allowance: Loop 2	CaPHw4	CaPHwOI2
Direct Payment/ Personal or Individual Budget from the Local Authority/ council/ Social Services: Loop 2	CaPHw5	CaPHwDP2
Other source: Loop 2	CaPHw6	CaPHwOt2
Own personal income, savings, pension or benefit (such as Attendance Allowance: Loop 3	CaPHw7	CaPHwOI3
Direct Payment/ Personal or Individual Budget from the Local Authority/ council/ Social Services: Loop 3	CaPHw8	CaPHwDP3
Other source: Loop 3	CaPHw9	CaPHwOt3

END OF FILTER

**CAPAD\***

And *[^in addition to what]* *[^you/[name]]* pay(s)), as far as you are aware does anyone else or any organisation pay or give money to *[[^BLANK/your/his/her/[^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper]* for the care *[^you/he/she]* receive(s) – for example the council or a family member? Do not count any benefits such as Carers Allowance or Attendance Allowance.

INTERVIEWER: CODE ALL THAT APPLY

- 01 Yes, the local authority /council /social services,
- 02 Yes, a family member (with their own money),
- 03 Yes, other,
- 04 No, nobody else pays

Description	Variable	Archive
Yes, the local authority /council /social services: Loop 1	CaPAd1	CaPAdLA
Yes, a family member (with their own money): Loop 1	CaPAd2	CaPAdFM
Yes, other: Loop 1	CaPAd3	CaPAdOt
No, nobody else pays: Loop 1	CaPAd4	CaPAdNo
Yes, the local authority /council /social services: Loop 2	CaPAd5	CaPAdLA2
Yes, a family member (with their own money): Loop 2	CaPAd6	CaPAdFM2
Yes, other: Loop 2	CaPAd7	CaPAdOt2
No, nobody else pays: Loop 2	CaPAd8	CaPAdNo2
Yes, the local authority /council /social services: Loop 3	CaPAd9	CaPAdLA3
Yes, a family member (with their own money): Loop 3	CaPAd10	CaPAdFM3
Yes, other: Loop 3	CaPAd11	CaPAdOt3
No, nobody else pays: Loop 3	CaPAd12	CaPAdNo3

*[CHECK SC10] CHECK: IF selects "No, Nobody else pays" AND any other response.*

*[IF (CaPAD= 4) AND (CAPAD = any 1 to 3)]*  
 "Nobody is an exclusive code. Please change!"

*IF other payment source = Yes, local authority/council/social services [CaPAAd = 1]*

**CALAP\***

And does the local authority, council or social services pay  
 [[^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other /other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] directly or is it through a Direct Payment or a Personal Budget?

INTERVIEWER: CODE ALL THAT APPLY:

- 01 Local authority / social services or council pay directly,
- 02 Paid through Direct Payments / Personal or Individual Budgets

Description	Variable	Archive
Local authority / social services or council pay directly: Loop 1	CaLAP1	CaLAPPa
Paid through Direct Payments / Personal or Individual Budgets: Loop 1	CaLAP2	CaLAPDP
Local authority / social services or council pay directly: Loop 2	CaLAP3	CaLAPPa2
Paid through Direct Payments / Personal or Individual Budgets: Loop2	CaLAP4	CaLAPDP2
Local authority / social services or council pay directly: Loop 3	CaLAP5	CaLAPPa3
Paid through Direct Payments / Personal or Individual Budgets: Loop3	CaLAP6	CaLAPDP3

END OF FILTER

*IF way usually pay = direct payment OR type of payment = paid through direct payments*

*[(CaPHw= 2) OR (CaLAP =2)]*

**CALAF\***

How much money is [[^BLANK/your/his/her/] [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other sister/ /other / other /friend/ other friend/neighbour/other neighbour/ the home care worker/ home help/ personal assistant/ the member of the reablement / intermediate care staff team/the voluntary helper/the warden / sheltered housing manager/the cleaner/the council's handyman/the member of staff at the care/nursing home/ the other helper] paid from the direct payment or personal budget for helping [^you/[name]]?

INTERVIEWER: ENTER REFERENCE PERIOD FOR PAYMENT ON THIS SCREEN. ENTER AMOUNT IN POUNDS AND PENCE ON NEXT SCREEN.

- 01 Per hour,
- 02 Per visit,
- 03 Per day,
- 04 Per week,
- 05 Per fortnight,
- 06 Per four weeks,
- 07 Per calendar month,
- 08 Per year

Description	Variable	Archive
Reference period for amount paid from direct payment or personal budget: Loop 1	CaLAF	CaLAF
Reference period for amount paid from direct payment or personal budget: Loop 2	CaLAF2	CaLAF2
Reference period for amount paid from direct payment or personal budget: Loop 3	CaLAF3	CaLAF3

*IF provided reference period for amount paid from direct payment or personal budget*

| [CaLAF = RESPONSE]

**CALAM\***

INTERVIEWER: ENTER AMOUNT IN POUNDS AND PENCE

1.00..999997.00

Description	Variable	Archive
Amount paid from direct payment or personal budget: Loop 1	CaLAM	CaLAM
Amount paid from direct payment or personal budget: Loop 2	CaLAM2	CaLAM2
Amount paid from direct payment or personal budget: Loop 3	CaLAM3	CaLAM3

END OF FILTER

*IF frequency of payment = NONRESPONSE OR payment amount = NONRESPONSE*

| [(CaLAF = NONRESPONSE) OR (CaLAM = NONRESPONSE)]

*IF frequency of payment = per hour*

| [CaLAF = 1]

**CALAAB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (£3, £5, £8, £12)

END OF FILTER

*IF frequency of payment = per visit, per day*

| [CaLAF = 2,3]

Was it less than [^amount], more than [^amount] or what?

BRACKETS (£5, £10, £20, £30)

END OF FILTER

*IF frequency of payment = per week*

| [CaLAF = 4]

Was it less than [^amount], more than [^amount] or what?

BRACKETS (£10, £25, £40, £100)

END OF FILTER

*IF frequency of payment = per fortnight*

| [CaLAF = 5]

Was it less than [^amount], more than [^amount] or what?

BRACKETS (£20, £50, £80, £200)

END OF FILTER

IF frequency of payment = four weeks, calendar month  
 [CaLAF =6,7]  
 Was it less than [^amount], more than [^amount] or what?  
 BRACKETS (£40, £100, £150, £400)

END OF FILTER

IF frequency of payment = per year  
 [CaLAF = 8]  
 Was it less than [^amount], more than [^amount] or what?  
 BRACKETS (£500, £1000, £2000, £5000)

END OF FILTER

IF frequency of payment = DK or RF  
 [CaLAF = DK, RF]  
 Was it less than [^amount], more than [^amount] or what?  
 BRACKETS (£40, £100, £150, £400)

END OF FILTER

END OF FILTER

END OF FILTER

IF payment for care = no OR other payment for care = no  
 [(CaPay=2) AND (CaPAd= 4)]

**CANOP\***

You have told me that no payment was made for [[^BLANK/your/his/her/]  
 [^husband/wife/partner/ son/other son/daughter/other grandchild /sister/other  
 sister/ brother/other brother / other /friend/ other friend/neighbour/other  
 neighbour/ the home care worker/ home help/ personal assistant/ the member of  
 the reablement / intermediate care staff team/the voluntary helper/the warden /  
 sheltered housing manager/the cleaner/the council's handyman/the member of  
 staff at the care/nursing home/ the other helper] helping [^you/[name]]. Why was  
 this?

INTERVIEWER: UNPROMPTED RESPONSE:

- 01 They provided their help for free/ there is no charge for the service,
- 02 Sometimes give them money or gifts for the help they give,
- 03 Other

Description	Variable	Archive
Provided help for free: Loop 1	CaNoP1	CaNoPF
Sometimes give them money or gifts: Loop 1	CaNoP2	CaNoPG
Other: Loop 1	CaNoP3	CaNoOt
Provided help for free: Loop 2	CaNoP4	CaNoPF2
Sometimes give them money or gifts: Loop 2	CaNoP5	CaNoPG2
Other: Loop 2	CaNoP6	CaNoOt2
Provided help for free: Loop 3	CaNoP7	CaNoPF3
Sometimes give them money or gifts: Loop 3	CaNoP8	CaNoPG3
Other: Loop 3	CaNoP9	CaNoOt3

END OF FILTER

END OF FILTER

END OF FILTER

END OF LOOP

**CADPA**

Computed: Whether any formal carers mentioned at CaHFO

1. Yes

*IF formal providers = yes OR hours of informal care = yes, 20 hours+ from an individual provider*

*[if CaDPA=yes]*

**CAWHO**

INTERVIEWER: WHO ANSWERED THE QUESTIONS IN THIS SECTION?

01 Respondent only,

02 Respondent with assistance of another person,

03 Another person with limited input from respondent,

04 Another person with no input from respondent.

END OF FILTER

*IF not currently in an institution [IF IAsInst[PNo] <> Yes]*

**CAHSA**

*[^During the last two years/since your last interview]* have you lived or stayed in a nursing home or residential care home?

01 Yes

02 No

*IF stayed in nursing or residential home in last 2 years = yes [IF CAHSA = Yes]*

**CAHSN**

*[^Altogether/]* how long did you stay in a nursing home or residential care home *[^in the last two years/since last interview]*? You can tell me your answer in days/nights, weeks or months.

INTERVIEWER: RECORD WHETHER ANSWER GIVEN IN DAYS/NIGHTS,

WEEKS

OR MONTHS.

01 Days/nights

02 Weeks

03 Months

**CAHST**

INTERVIEWER: ENTER NUMBER OF DAYS/NIGHTS, WEEKS OR MONTHS.

Range: 0...40

END OF FILTER

END OF FILTER

*IF currently in an institution = yes*

**CAHSTAY**

When did you start your current stay in this home?

INTERVIEWER: ENTER YEAR

Range 2001..9997

**CAHSTAM**

"(When did you start your current stay in this home?)

INTERVIEWER: ENTER MONTH."

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

END OF FILTER

IF CAHSA=YES OR CURRENTLY in institution [*/Ast/Inst[/PNo=yes]*]

**CAHSC**

In total, roughly how much did you have to pay for nursing or residential care home fees [in the last two years/since last interview]? Do not include costs that were paid by the NHS, your local authority or social services, but do include costs that were paid for on your behalf by friends or family, or by private insurance.

INTERVIEWER: ENTER COSTS IN £": 0..9999997

*IF amount = DK, RF*

*[(CAHSC = DK) OR (CAHSC = RF)]*

**CAHSCB**

Would it be.....

BRACKETS (2000, 10000, 25000, 50000)

*[The bracket variables are recoded in variables CAHSCL CAHSCU CAHSC*

*CAHSCR]*

END OF FILTER

END OF FILTER

**CAPSB\***

**SHOWCARD C20**

[^Have/Has] [^you/name] used any of the services listed on this card in the last three months?

CODE ALL THAT APPLY.

- 01 Occupational therapist or physiotherapist
- 02 Chiropodist or podiatrist
- 03 Exercise classes including yoga, Pilates, gym
- 04 GP
- 05 Dentist
- 06 Community nurse
- 07 Hospital nurse
- 08 Counselling for depression or anxiety
- 09 Other mental health care services



- 10 Personal care (e.g. bathing, showering, dressing, toileting)  
 95 Other [please specify]  
 96 None of these

Description	Variable	Archive
Occupational therapist or physiotherapist	CAPSB1	CAPSB1
Chiropodist or podiatrist	CAPSB2	CAPSB2
Exercise classes including yoga, pilates, gym	CAPSB3	CAPSB3
GP	CAPSB4	CAPSB4
Dentist	CAPSB5	CAPSB5
Community nurse	CAPSB7	CAPSB7
Hospital care	CAPSB10	CAPSB10
Counselling for depression or anxiety	CAPSB8	CAPSB8
Other mental health care services	CAPSB11	CAPSB11
Personal care	CAPSB9	CAPSB9
Other	CAPSB95	CAPSB95
None of these	CAPSB96	CAPSB96

IF used services = other  
 [CAPSB = 95]

**CAPSBO\***

INTERVIEWER: Please specify other answer.  
 STRING[80]

END OF FILTER

**Open responses to CAPSBO are coded and merged with the multiple responses to CAPSB. These merged responses are recoded in variables:**

Description	Variable	Archive
Occupational therapist or physiotherapist	CaPSBM1	CAhsmot
Chiropodist or podiatrist	CaPSBM1 2	Cahsmch
Exercise classes including yoga, pilates, gym	CaPSBM3	Cahsmex
GP	CAPSBM4	
Dentist	CAPSBM5	
Community nurse	CAPSBM7	
Hospital care	CAPSBM?	
Counselling for depression or anxiety	CAPSBM8	
Personal care	CAPSBM9	
Other mental health care services	CAPSBM?	
Osteopath	CaPSBM10	CAhsmos
Chiropractor	CaPSBM11	Cahsmcr
Massage	CaPSBM12	CAhsmma
Acupuncture	CaPSBM13	CAhsmac
Other alternative therapies e.g. reflexology, aromatherapy, homeopathy	CaPSBM14	CAhsmth
Hydrotherapy	CaPSBM15	CAhsmhy
Other answer - not codeable	CaPSBM85	CAhsm85
Irrelevant answer - not codeable	CaPSBM86	CAhsm86
None of these	CaPSBM96	CAhsm96

CHECK SIGNAL: *If selects "None of these" AND any other response.*  
*[IF CAPSB=96 AND CAPSB = any 1 to 95]*  
INTERVIEWER: *"None" is an exclusive code at this question. Please change!*

**CAPSAcc\***  
**SHOWCARD C20**

[^Have/Has] [^you/name] wanted to use any of the services listed on this card in the last three months but been unable to access them?

CODE ALL THAT APPLY.

- 01 Occupational therapist or physiotherapist
- 02 Chiropodist or podiatrist
- 03 Exercise classes including yoga, Pilates, gym
- 04 GP
- 05 Dentist
- 06 Community nurse
- 07 Hospital nurse
- 08 Counselling for depression or anxiety
- 09 Other mental health care services
- 10 Personal care (e.g. bathing, showering, dressing, toileting)
- 95 Other [please specify]
- 96 None of these

*IF services not accessed= other [CAPSAcc = 95]*

**CAPSAco\***

INTERVIEWER: Please specify other answer.

STRING[80]

END OF FILTER

*IF accessed GP (GP IN CAPSB)*

**CAGP**

During the four weeks ending yesterday, did you talk to a family doctor (GP) about your own health either in person or by telephone?

- 1 Yes
- 2 No

*IF spoke to family doctor (CAGP = yes)*

**CADrNHS**

Thinking of the last time you talked to a doctor, was this consultation...

INTERVIEWER: Read out ...

- 1 ...Under the National Health Service,
- 2 Or, paid for privately?

*If NHS consultation (CAGPNHS = NHS)*

**CAGPApp**

**SHOWCARD C21**

How long did you have to wait between first trying to get an appointment and talking to the doctor?

- 1 Less than 2 weeks
- 2 From 2 weeks to 6 months
- 3 Over 6 months

END OF FILTER

END OF FILTER

*IF accessed dentist (Dentist IN CAPSB)*

**CADentist**

During the four weeks ending yesterday, did you talk to a dentist about your own health either in person or by telephone?

- 1 Yes
- 2 No

*IF spoke to dentist (CAGP = yes)*

**CADentNHS**

Thinking of the last time you talked to a dentist, was this consultation...

INTERVIEWER: Read out ...

- 1 ...Under the National Health Service,
- 2 Or, paid for privately?

*If NHS dentist consultation (CADentNHS = NHS)*

**CADentApp****SHOWCARD C21**

How long did you have to wait between first trying to get an appointment and talking to the dentist?

- 1 Less than 2 weeks
- 2 From 2 weeks to 6 months
- 3 Over 6 months

END OF FILTER

END OF FILTER

END OF FILTER

*IF accessed personal care (Personal care IN CAPSB)*

**CAPCare**

During the four weeks ending yesterday, did you receive personal care (for example, help with bathing, showering, dressing, toileting)?

- 1 Yes
- 2 No

*IF received personal care in last 4 week (CAPCare = yes)*

**CAPCareSS**

Thinking of the last time you received personal care, was this...

INTERVIEWER: Read out ...

- 1 ...Under Social Services,
- 2 Or, paid for privately?

*If personal care from Social Services (CAPCareSS = Social Services)*

**CAPCareWait****SHOWCARD C21**

How long did you have to wait between first trying to get personal care and receiving care?

- 1 Less than 2 weeks
- 2 From 2 weeks to 6 months
- 3 Over 6 months

END OF FILTER

END OF FILTER

END OF FILTER

*IF age of respondent >= 65*

*[AgeP >= 65]*

**CACLUB\***

In the last month [<sup>^</sup>have/has] [<sup>^</sup>you/<sup>^</sup>name]]... READ OUT ...

CODE ALL THAT APPLY.

01 Attended a lunch club

02 Attended a day care centre

03 Had meals on wheels

04 Had private frozen meals from a provider such as Wiltshire farm foods

05 Had family, friend or neighbour bring [<sup>^</sup>you/him/her] ready prepared meals

96 None of these

Description	Variable	Archive
Attended a lunch club	CaClub1	CaClub1
Attended a day care centre	CaClub2	CaClub2
Had meals on wheels	CaClub3	CaClub3
Had private frozen meals from a provider such as Wiltshire farm foods	CaClub4	CaClub4
Had family, friend or neighbour bring [ <sup>^</sup> you/him/her] ready prepared meals	CaClub5	CaClub5
None of these	CaClub6	CaClub6

*[CHECK SC11] CHECK: IF selects "None of these" AND any other response.*

*[IF (CACLUB = 96) AND (CACLUB = any 1 to 5)].*

*'None of these' is an exclusive code for this question.*

*IF care provided = lunch club*

*[CaClub = 1]*

**CALC\***

**SHOWCARD C22**

How often [<sup>^</sup>do/does] [<sup>^</sup>you/<sup>^</sup>Name]] attend a lunch club?

01 Every day or nearly every day

02 Two or three times a week

03 Once a week

04 Two or three times a month

05 Once a month or less

END OF FILTER

*IF care provided = day care centre*

*[CaClub = 2]*

**CADCC\***

**SHOWCARD C22**

How often [<sup>^</sup>do/does] [<sup>^</sup>you/<sup>^</sup>Name]] attend a day care centre?

01 Every day or nearly every day

02 Two or three times a week

03 Once a week

04 Two or three times a month

05 Once a month or less

*IF frequency attend day care centre = every day or nearly every day*

*[CaDCC = 1]*

**CADCD\***

Each time that [<sup>^</sup>you/<sup>^</sup>Name]] [<sup>^</sup>have/has] attended the day centre, including attending classes or groups run by the day centre in the last month about how many hours did [<sup>^</sup>you/he/she] usually spend there? Was it...READ OUT...

- 01 1-3 hours
- 02 4-6 hours, or
- 03 more than 6 hours

END OF FILTER

END OF FILTER

*IF care provided = meals on wheels*

*[CaClub = 3]*

**CAMW\***

**SHOWCARD C22**

How often [**^do/does**] [**^you/^[Name]**] eat a meal provided by Meals on Wheels?

- 01 Every day or nearly every day
- 02 Two or three times a week
- 03 Once a week
- 04 Two or three times a month
- 05 Once a month or less

END OF FILTER

**CAHMN\***

In the last three months, [**^have/has**] [**^you/^[Name]**] used or received the Local Authority/council's Handy man's service?

This is usually a free service sometimes arranged through Age Concern or Help the Aged.

- 01 Yes
- 02 No

END OF FILTER

**NOTE: Health Questions HEAID to HEAP2 are presented in the program after the social care section.**

**HEAID\***

**SHOWCARD C23**

[**^Do you / Does**] [**^name**] use any of these?

Only include personal alarms used to call for assistance after falls etc.

- 01 A cane or walking stick
- 02 A zimmer frame or walker
- 03 A manual wheelchair
- 04 An electric wheelchair
- 05 A buggy or scooter
- 06 Special eating utensils
- 07 A personal alarm
- 08 Elbow crutches
- 96 None of these

**[code maximum 8 out of 9 possible responses]**

**Multiple responses to HEAID are recoded in variables:**

Description	Variable	Archive
A cane or walking stick	HeAid1	headca
A zimmer frame or walker	HeAid2	headzi
A manual wheelchair	HeAid3	headmw
An electric wheelchair	HeAid4	headew

A buggy or scooter	HeAid5	heidbu
Special eating utensils	HeAid6	heaidea
A personal alarm	HeAid7	heaidal
Elbow crutches	HeAid8	heaidcr
None of these	HeAid96	heid96

**[CHECK SC12] CHECK:** IF selects "None of these" AND any other response.  
 [IF (Heaid =96) AND ( HEAid = any 1 to 8)]  
 INTERVIEWER: 'None' is an exclusive code at this question. Please change!

IF use of aids = RESPONSE AND NOT use of aids = None  
 [HEAid = RESPONSE] AND NOT (HEAid=96]

IF date of last interview = RESPONSE  
 [PrevDate = RESPONSE]

IF number of aids coded at HeAid > 0 (has at least one aid) AND NOT refreshment  
 sample indicator = yes  
 [(HeAid.CARDINAL>0) AND NOT (RefreshIV = 1)]

**HEA1CH\***

You mentioned that [^you/name] [^have/has] the aids listed below:  
 [^ cane or walking stick/ zimmer frame or walker/ manual wheelchair/ electric  
 wheelchair/ buggy or scooter/ personal alarm/ elbow crutches >].  
 Can I check, did [^you/he/she] get any of these aids since [^<date of last  
 interview>]?

INTERVIEWER: Please include any replacements.

- 01 Yes
- 02 No

END OF FILTER

END OF FILTER

LOOP FOR EACH NEW AID:

IF any aids new since last interview = Yes, DK or REF [HeA1ch =1, -8 or -9]

IF date of last interview = RESPONSE AND NOT refreshment sample indicator =  
 yes  
 [(PrevDate=RESPONSE) AND (NOT ( RefreshIV = 1))]

**HEA2CH\***

Can I check, did [^you/name] get [^this/these] [^cane or walking stick/ zimmer  
 frame or walker/ manual wheelchair/ electric wheelchair/ buggy or scooter/  
 personal alarm/ elbow crutches] since [^<date of last interview>]

INTERVIEWER: Please include any replacements.

- 01 Yes
- 02 No

END OF FILTER

LOOP IF existing sample and got an aid since last interview or reported an aid for  
 first time as refreshment sample or new partner:

If aids new since last interview = yes OR refreshment sample indicator = yes  
 OR ((NOT (date of last interview = RESPONSE)) AND ((NOT(refreshment sample  
 indicator = yes)))

[(HeA2ch = 1) OR (Refresh = 1) OR ((NOT(PrevDate = RESPONSE)) AND (NOT(RefreshIV = 1)))] LOOP for each aid mentioned at HEAID (for refreshment or new partner or HEA2Ch for existing)

### HEAIDP\*

Who paid for the [^cane or walking stick/ zimmer frame or walker/ manual wheelchair/ electric wheelchair/ buggy or scooter/ personal alarm/ elbow crutches]?

INTERVIEWER: Read out each in turn and code all that apply.

- 1 Health Service (NHS)
- 2 Social Services
- 3 [^You/Name] or [^your/his/her spouse/partner]
- 95 or someone else (please specify)?

**Multiple responses to HEAIDP are recoded in variables**

Description	Variable	Archive
Cane or walking stick: Health Service (NHS)	HeAidP1	hecanhs
Cane or walking stick: Social Services	HeAidP2	hecass
Cane or walking stick: You or your spouse/partner	HeAidP3	hecase
Cane or walking stick: Someone else	HeAidP95	hecaot
Zimmer frame or walker: Health Service (NHS)	HeAidP4	hezinhs
Zimmer frame or walker: Social Services	HeAidP5	heziss
Zimmer frame or walker: You or your spouse/partner	HeAidP6	hezise
Zimmer frame or walker: Someone else	HeAidP96	heziot
Manual wheelchair: Health Service (NHS)	HeAidP7	hemwnhs
Manual wheelchair: Social Services	HeAidP8	hemwss
Manual wheelchair: You or your spouse/partner	HeAidP9	hemwse
Manual wheelchair: Someone else	HeAidP97	hemwot
Electric wheelchair: Health Service (NHS)	HeAidP10	heewnhs
Electric wheelchair: Social Services	HeAidP11	heewss
Electric wheelchair: You or your spouse/partner	HeAidP12	heewse
Electric wheelchair: Someone else	HeAidP98	heewot
Buggy or scooter: Health Service (NHS)	HeAidP13	hebunhs
Buggy or scooter: Social Services	HeAidP14	hebuss
Buggy or scooter: You or your spouse/partner	HeAidP15	hebuse
Buggy or scooter: Someone else	HeAidP99	hebuot
Eating utensils: Health Service (NHS)	HeAidP16	
Eating utensils: Social Services	HeAidP17	
Eating utensils: You or your spouse/partner	HeAidP18	
Eating utensils: Someone else	HeAid100	
Personal alarm: Health Service (NHS)	HeAidP19	hepanhs
Personal alarm: Social Services	HeAidP20	hepass
Personal alarm: You or your spouse/partner	HeAidP21	hepase
Personal alarm: Someone else	HeAid101	hepaot
Elbow crutches: NHS	HeaidP22	hecrnhs
Elbow crutches: Social Services	HeaidP23	hecrss
Elbow crutches: You or your spouse/partner	HeaidP24	hecrse
Elbow crutches: Someone else	Heaid102	hecrot

IF who paid for aid = other

[HeAidp = 95]

### HEAPO\*

Please specify.

STRING[50]

*[Open responses to HEAPO are coded and merged with the multiple responses to HEAIDP (recoded as above). These merged responses are recoded in variables:*

**HECAMNS HECAMSS HECAMSE HECAMFF HECAMLL HECAMCH  
HECAMFR HECAM85 HECAM86 HEZIMNHS HEZIMSS HEZIMSE HEZIMFA  
HEZIMLL HEZIMCH HEZIMFR HEZIM85 HEZIM86 HEMWMNHS HEMWMSS  
HEMWMSE HEMWMFA HEMWMLL HEMWMCH HEMWMFR HEMWM85  
HEMWM86 HEEWMNHS HEEWMSS HEEWMSE HEEWMFA HEEWMLL  
HEEWMCH HEEWMFR HEEWM85 HEEWM86 HEBUNHS HEBUMSS  
HEBUMSE HEBUMFA HEBUMLL HEBUMCH HEBUMFR HEBUM85  
HEBUM86 HEALNHS HEALMSS HEALMSE HEALMFA HEALMLL HEALMCH  
HEALMFR HEALM85 HEALM86 HECRNHS HECRMSS HECRMSE HECRMFA  
HECRMLL HECRMCH HECRMFR HECRM85 HECRM86]**

END OF FILTER

*IF only mentioned one answer at HEAidP*

*[HeAidp=1 answer only]*

**HEAP2\***

Can I just check that [<sup>^</sup>the NHS/Social Services/ you/ your spouse or partner] covered all the costs of the [<sup>^</sup>cane or walking stick/ zimmer frame or walker/ manual wheelchair/ electric wheelchair/ buggy or scooter/ personal alarm/ elbow crutches]?

1 Yes covered all costs

2 No

Description	Variable	Archive
Cane or walking stick	HeAP2	hecacov
Zimmer frame or walker	HeAP3	hezicov
Manual wheelchair	HeAP4	hemwcov
Electric wheelchair	HeAP5	heewcov
Buggy or scooter	HeAP6	hebucov
Personal alarm	HeAP7	hepacov
Elbow crutches	HeAP8	hecrcov

END OF FILTER

*[CHECK SC13] CHECK: IF only one option selected at HEAidP AND did not cover all the costs.*

*[IF (HeAIDP = only one option selected at HEAidP) AND (HEAP2= 2)].*

*INTERVIEWER: Please go back and add who else paid for the mobility aid at HeAidP.*

END OF LOOP

END OF LOOP

END OF FILTER

C26C26C26



# 1 - FEMALE HEALTH MODULE & GP VISITS (FH)

**Note: Refreshment indicator (Refresh) is no longer at the household level but at the individual level and the variable is called RefreshIV. The derivation for RefreshIV is as follows:**

**If Cohort<10, RefreshIV = No**  
**If Cohort=10 and IVout<30, RefreshIV = NO**  
**If Cohort=10 and IVout=>30, RefreshIV = YES**  
**If Cohort=11, RefreshIV = Yes**

The routing for the whole of this section is:  
IF sex is female [Sex = Female]

IF age started menstruation not in feed-forward data (NA, DK, Ref, empty)  
OR operation to remove uterus or womb either no at previous wave or not in feed-forward data (No, NA, DK, Ref, new partner)  
OR operation to remove ovaries either no at previous wave or not in feed-forward data (No, NA, DK, Ref, new partner)  
OR either had period within last 12 months at previous wave or not in feed-forward data (Yes, NA, DK, Ref, new partner)  
OR reason period stopped in feed-forward data = pregnancy  
[(ff\_Hemen = 9991, 9998, 9999, empty) OR (ff\_Hehye = 2, 9991, 9998, 9999, empty)  
OR (ff\_HeOve = 2, 9991, 9998, 9999, empty) OR (ff\_HEpee = 1, 9991, 9998, 9999, empty)  
OR (ff\_Heper = Preg)]

## HEMIN @

The next set of questions are just for women and ask about menstrual periods and issues to do with reproductive organs.

INTERVIEWER: Press <1> and <Enter> to continue.

## HEMEN

About how old were you when you had your first menstrual period?

INTERVIEWER: If cannot give exact age, code 95 and ask age band at the next question.

Range 0..95

*[CHECK HE74] SIGNAL: IF (first had menstrual period after age of 20) [HEMEN > 20 AND HEMEN <> 95] Are you sure the respondent started their periods after the age of 20? If yes please explain in a note.*

*[CHECK HE75] SIGNAL: IF (first had menstrual period before age of 8) [HEMEN < 8 AND HEMEN <> 95] Are you sure the respondent started their periods before the age of 8? If yes please explain in a note.*

IF age started menstruation = unsure

[HEMEN = 95]

## HEMEB

Were you...

1 ...less than 11 years old,

2 between 11 and 12 years old,  
3 between 13 and 15 years old,  
4 between 16 and 18 years old,  
5 or more than 18 years old?

END OF FILTER

*IF operation to remove uterus or womb either no at previous wave or not in feed-forward data (No, NA, DK, Ref, new partner)  
[(ff\_Hehye = 2, 9991, 9998, 9999, empty)]*

**HEHYE**

Have you had an operation for the removal of your uterus or womb?

1 Yes  
2 No

*IF operation to remove uterus or womb = yes  
[HEHYE = 1]*

**HEHY @**

When was this operation for the removal of your uterus or womb?

INTERVIEWER: Enter year.

Range: 1900..9997

*IF year of operation = DK  
[HEHY @ = DK]*

**HEHYA**

(If you cannot remember the year) please give your age when you had your uterus or womb removed.

INTERVIEWER: Enter age.

Range 0..150

END OF FILTER

END OF FILTER

END OF FILTER

*IF (operation to remove ovaries either no at previous wave or not in feed-forward data (No, NA, DK, Ref, new partner)  
[(ff\_HeOve = 2, 9991, 9998, 9999, empty)]*

**HEOVE**

Have you had an operation to remove both your ovaries (a bilateral oophorectomy)?

1 Yes  
2 No

*IF oophorectomy = yes  
[HEOVE = 1]*

**HEOVY**

When was this operation for the removal of your ovaries?

Range: 1900..9997

*IF oophorectomy year = DK*

[HEOVY = DK]

**HEOVYA**

(If you cannot remember the year) please give your age when you had your ovaries removed.

INTERVIEWER: Enter age.

Range : 0..150

END OF FILTER

END OF FILTER

END OF FILTER

*IF (either had period within last 12 months at previous wave or not in feed-forward data (Yes, NA, DK, Ref, new partner) OR reason period stopped in feed-forward data = pregnancy)*

*[(ff\_HEpee = 1, 9991, 9998, 9999, empty) OR (ff\_Heper = 1)]*

**HEPEE**

In the past 12 months have you had a period or menstrual bleeding?

1 Yes

2 No

*[CHECK HE76] SIGNAL: IF (had period or menstrual bleeding in last 12 months AND had an operation for the removal of your uterus or womb or had an operation to remove both your ovaries ([HEPEE= yes] AND [HEHYE = Yes OR HEOVE = Yes])*

*Interviewer: Are you sure the respondent has had a period in the last 12 months, as they have said that they have had their uterus, womb or ovaries removed? If yes please explain in a note.*

*IF past year menstruation = no*

*[HEPEE = 2]*

**HEPEY**

In what year did you have your last period?

Range : 1900..2050

*[CHECK HE77] SIGNAL: IF (year of last period if greater than year of interview [HEPEY > (YEAR)SIIntDat])*

*INTERVIEWER: This date is in the future (^HePey)! Please change!*

*IF year of last period = DK*

*[HEPEY = DK]*

**HEPEA**

(If you cannot remember the year) please give your age when you had your last period.

INTERVIEWER: Enter age.

Range: 0..150

*[CHECK HE78] SIGNAL: IF age of last period is less than 20 [HEPEA < 20]*

*Interviewer: Are you sure respondent period stopped at this age? If so please explain in a note.*

*[CHECK HE79] SIGNAL: IF age of last period is less than age of first period*

*[HEPEA < HEMEN]*

Interviewer: Are you sure respondent period stopped at this age? If so please explain in a note.

END OF FILTER

**HEPER**

Were your periods stopped by...

- 1 the menopause (or no obvious reason)
- 2 surgery (incl, sterilisation/hysterectomy)
- 3 chemotherapy
- 4 pregnancy or breast feeding
- 5 or for another reason?

*IF reason for periods stopping = other*

*[HEPER = 5]*

**HEPRB**

INTERVIEWER: specify other reason periods stopped.

STRING [50]

*[Open responses to HEPRB were coded and then incorporated into HEPER.]*

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF ever taken HRT either no at previous wave or not in feed-forward data (No, DK, Ref, NA, new partner)*

*[ff\_Hehrt= = 2, 9991, 9998, 9999, empty]*

**HEHRT**

This section is about hormone replacement therapy (HRT).

Have you ever taken HRT?

- 1 Yes
- 2 No

*IF ever taken HRT = yes*

*[HEHRT = 1]*

**HEH FY**

When did you first start HRT (hormone replacement therapy)?

INTERVIEWER: Enter year.

Range : 1900..2050

**HEH FM**

In what month did you first start HRT (hormone replacement therapy)?

*[CHECK HE80] SIGNAL: IF first started HRT in the future [HEH FY > SIntDate.YEAR]*

You have entered a future year. Please check and amend.]

**[CHECK HE81] SIGNAL:** *IF first start HRT in the future [HEHFM > SIntDate.MONTH]*

You have entered a future date. Please check and amend.]

*IF year of starting HRT = DK*

*[HeHFY = DK]*

**HEHFA**

(If you cannot remember the year) please give your age when you first started HRT.

INTERVIEWER: Enter age.

Range : 0..150

END OF FILTER

**HEHPS**

When you first started HRT had your periods stopped?

1 Yes

2 No

*IF periods stopped before started HRT = yes*

*[HEHPS = 1]*

**HEHPY**

How long after your last period did you start HRT?

1 Less than 3 months

2 3-6 months

3 7-12 months

4 More than 12 months

END OF FILTER

END OF FILTER

END OF FILTER

*IF reported [this interview] that has ever taken hormone replacement therapy*

*[HEHRT = 1]*

**HEHNO**

Are you currently on HRT?

1 Yes

2 No

*IF currently on HRT = no*

*[HEHNO = 2]*

**HEHST**

When did you last take HRT?

INTERVIEWER: Enter year.

Range : 1900..2050

**[CHECK HE82]:** *IF last take HRT in the future [HEHST SIntDate.YEAR]*

You have entered a future year. Please check and amend.

IF when last took HRT = DK  
[HEHST = DK]

**HEHSTA**

(If you cannot remember the year) please give your age when you last took HRT.

INTERVIEWER: Enter age.

Range : 0..150

END OF FILTER

END OF FILTER

END OF FILTER

**Note: HEGPOFT, HEGPNHS and HETSET come after the female health module but are specced in the health module as not limited to just women.**

## 4 - SOCIAL PARTICIPATION MODULE (SP)

### SPCAR\*

[^Do you/ Does [^name]] have use of a car or van when [^you/he/she] need[^s] one (either as a passenger or driver)?

- 1 Yes
- 2 No

*IF has use of car or van = Yes*

[SPCar = 1]

### SPCARA\*

[^Do you/ Does [^name]] ever drive this car or van [^your/him/herself]?

- 1 Yes
- 2 No, passenger only

END OF FILTER

*IF has use of a car or van = No OR personally drives = No*

[(SPCar = 2) OR (SPCarA = 2)]

### SPCARB\*

In the past did [^you/[^name]] drive a car or van [^your/him/herself]?

- 1 Yes
- 2 No

END OF FILTER

### SPTRAA\*

#### SHOWCARD D1

How often [^do you/does [^name]] use public transport?

INTERVIEWER: IF QUERIED BY RESPONDENT ASK THEM TO THINK OF THE LAST THREE MONTHS

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 Never

*IF uses public transport = two or three times a month or less or never*

[SPTraA = 4, 5, 6]

### SPTRAB

#### SHOWCARD D2

Why don't you use public transport more often?

PROBE: What else?

CODE ALL THAT APPLY.

- 1 No public transport available
- 2 Public transport available does not take me where I want to go
- 3 Too expensive
- 4 Unreliable
- 5 Infrequent
- 6 My health prevents me

- 7 Do not need to
- 8 Fear of crime
- 9 Too dirty
- 10 Not convenient
- 11 Prefer to walk
- 12 Difficulties with mobility
- 88 Lockdown and social distancing have reduced my use of public transport
- 95 Other (specify)

**[Multiple responses to SPTRAB are recoded in variables: SPTRAB1 to SPTRAB12, SPTRAB 95]**

Description	Variable	Archive
No public transport available	SPTraB1	SPTraB1
Public transport available does not take me where I want to go	SPTraB2	SPTraB2
Too expensive	SPTraB3	SPTraB3
Unreliable	SPTraB4	SPTraB4
Infrequent	SPTraB5	SPTraB5
My health prevents me	SPTraB6	SPTraB6
Do not need to	SPTraB7	SPTraB7
Fear of crime	SPTraB8	SPTraB8
Too dirty	SPTraB9	SPTraB9
Not convenient	SPTraB10	SPTraB10
Prefer to walk	SPTraB11	SPTraB11
Difficulties with mobility	SPTraB12	SPTraB12
Lockdown and social distancing have reduced my use of public transport	SPTraB88	SPTraB88
Other	SPTraB95	SPTraB95

*IF Reasons for not using public transport = other*  
*[SPTraB = 95]*

**SPPUBX @**

INTERVIEWER: Enter details of other reasons.  
 String 60

**[Open responses to SPPUBX are coded and merged with the multiple responses to SPTRAB (recoded as above). These merged responses are recoded in variables SPTRAM1 to SPTRAM12, SPTRAB85 & SPTRAB86]**

Description	Variable	Archive
No public transport available	SPTraB1	SPTraB1
Public transport available does not take me where I want to go	SPTraB2	SPTraB2
Too expensive	SPTraB3	SPTraB3
Unreliable	SPTraB4	SPTraB4
Infrequent	SPTraB5	SPTraB5
My health prevents me	SPTraB6	SPTraB6
Do not need to	SPTraB7	SPTraB7
Fear of crime	SPTraB8	SPTraB8
Too dirty	SPTraB9	SPTraB9
Not convenient	SPTraB10	SPTraB10
Prefer to walk	SPTraB11	SPTraB11
Difficulties with mobility	SPTraB12	SPTraB12
Lockdown and social distancing have reduced my use of public transport	SPTraB88	SPTraB88



Other [not codable]	SPTraB95	SPTraB95
Prefer to use car	SPTraB85	SPTraB85
Prefer to use bicycle	SPTraB86	SPTraB86
Other person's health prevents it	SPTraB87	SPTraB87
Rarely go out	SPTraB88	SPTraB88

END OF FILTER

END OF FILTER

*IF age >=65 or drives own car = no*

| *[(IAgeOf>=65) or (SPCarA = 2)]*

**SPTRO\***

**SHOWCARD D3**

*[^Do you/Does [^name]] ever use any of the following means of transport?*

INTERVIEWER: CODE ALL THAT APPLY.

Community transport (Code 3) does not apply to vehicles used exclusively by a care home for their own needs.

INTERVIEWER: Category 5 on showcard only shown in CAPI for respondents in institutions.

- 1 Lifts from family or friends not lived with
- 2 Taxi
- 3 Door-to-door community transport, e.g. dial-a-ride
- 4 Transport provided by hospital / day centre / lunch club
- 5 *[^(Care home respondents only) Transport provided by care home]*
- 96 None of these

Description	Variable	Archive
Lifts from family or friends not lived with	SpTrO1	SpTrO1
Taxi	SpTrO2	SpTrO2
Door-to-door community transport	SpTrO3	SpTrO3
Transport provided by hospital	SpTrO5	SpTrO5
Transport provided by care home	SpTrO6	SpTrO6
None of these	SpTrO96	SpTrO96

*IF other transport used = family*

| *[SpTrO = 1]*

**SPLIFT\***

**SHOWCARD D4**

*How often [^do you/does [^name]] get lifts from family or friends who do not live with [^you/him/her]?*

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

*IF other transport used = taxi*

| *[SpTrO =2]*

**SPTAXI\***  
**SHOWCARD D4**

How often [**^do you/does name**] use a taxi?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

*IF other transport used = door-to-door community transport*

*[SpTrO= 3]*

**SPDTDT\***  
**SHOWCARD D4**

How often [**^do you/does [^name]**] use door-to-door community transport?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

*IF other transport used = hospital*

*[SpTrO=4]*

**SPHOSP\***  
**SHOWCARD D4**

How often [**^do you/does [^name]**] use transport provided by the hospital/day centre/lunch club?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END OF FILTER

END OF FILTER

**W6: Removed SPSINT, SPSAre, SPSAcc**

*IF age >= 60*

*[IAgeOf>=60]*

**SPBSPS\***

[**^Do you/ Does [^name]**] have a concessionary travel bus pass issued by [**^your/his/her**] local authority?

INTERVIEWER: IF THE RESPONDENT IS IN LONDON, PLEASE PROMPT THAT THIS PASS COULD BE CALLED THE FREEDOM PASS.

INTERVIEWER: THIS PASS ALLOWS FREE BUS TRAVEL ON OFF-PEAK BUSES.

1 Yes

2 No

*IF has bus travel pass = yes*

*[SpBsPs = 1]*

**SPBSTM\***

In the last month, how many times [*^have you/has ^name*] used [*^your/his/her*] concessionary travel bus pass when boarding a bus?

INTERVIEWER: IF [*^YOU/NAME*] USED THE PASS SEVERAL TIMES TO MAKE ONE JOURNEY PLEASE INCLUDE EACH BOARDING. IF RESPONDENT NEEDS FURTHER CLARIFICATION - FOR EXAMPLE IF [*^YOU/NAME*] USED TWO BUSES FOR A SINGLE JOURNEY THIS WOULD COUNT AS TWO BOARDINGS."

0 None

1 1-5

2 6-10

3 11-20

4 21 or more

END OF FILTER

END OF FILTER

**SpTSet @**

INTERVIEWER: The Social Participation section is finished.

Please enter 1 here to make the program store the current time and date.

## 5 - WORK AND PENSIONS MODULE(WP)

### WPINT\*

Now I have some questions about work, retirement and pensions.

1. PRESS <1> AND <ENTER> TO CONTINUE.

### WPACT\*

#### SHOWCARD E1

Did [<sup>^</sup>you/<sup>^</sup>Name]] do any of these activities during the last month, that is since [<sup>^</sup>date one month ago]?

IF YES, PROBE: WHICH ONES?

CODE ALL THAT APPLY.

- 1 Paid work
- 2 Self-employment
- 3 Voluntary work
- 4 Cared for someone
- 5 Looked after home or family
- 6 Attended a formal educational or training course
- 96 None of these

**[Code maximum 6 out of 7 possible responses]**

Description	Variable	Archive
Paid work	WPACT1	WPACTPW
Self-employment	WPACT2	WPACTVW
Voluntary work	WPACT3	WPACTS
Cared for someone	WPACT4	WPACTCA
Looked after home or family	WPACT5	WPACTLO
Attended a formal educational or training course	WPACT6	WPACTED
None of these	WPACT96	WPACT96

**[CHECK WP1] CHECK:** IF selects "None of these" AND any other response at WPACT

IF (WPACT=96) AND (WPACT = any 1 to 6)

INTERVIEWER: 'NONE' IS AN EXCLUSIVE CODE AT THIS QUESTION. PLEASE CHANGE!

IF NOT in paid work or self-employment during last month

[WPACT = 3 or 4 or 5 or 6 or 96]

#### WPAWAY\*

Can I just check, at any point during the last month [<sup>^</sup>were you/was [<sup>^</sup>name]] 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 [exclusive]

END OF FILTER

#### WPACTW

Computed: prioritised value of work status in last month

- 1 In paid work
- 2 Temporarily away from paid work
- 3 Waiting to take up paid work already accepted

#### 4 Not in paid work

##### **Derivation Logic**

*IF (WPACT = 1) OR (WPACT = 2) THEN WPACTW:= 1. PAIDW  
ELSEIF (WPAWAY = 1) THEN WPACTW:=2. TEMPAWAY  
ELSEIF (WPAWAY = 3) THEN WPACTW:= 3. WAITWORK  
ELSEIF (WPACT = RESPONSE OR WPAWAY = RESPONSE) THEN WPACTW:= 4.  
NOWORK*

*IF derived activity status = temporarily away from paid work [WPACTW = 2]*

##### **WPTAW\***

What was the main reason [*^you were / ^name*] was] away from work last month?

CODE ONE ONLY

- 01 Leave/holiday
- 02 Sick/injured
- 03 Attending a training course
- 04 Laid off/on short time
- 05 On strike
- 06 Maternity/paternity leave
- 07 Other personal/family reasons
- 95 Other reasons (specify)

ADDITIONAL CODED ANSWERS AFTER INTERVIEW

- 85 Other answer - not codeable 01-07
- 86 Irrelevant answer - not codeable 01-07

*IF reason temporarily away from paid work = other  
[WPTAW = 95]*

##### **WPTAWO\***

INTERVIEWER WRITE IN OTHER REASON

STRING: 60

*[Open responses to WPTAWO were coded and then incorporated into  
WPTAW.]*

END OF FILTER

END OF FILTER

##### **WPDES\***

##### **SHOWCARD E2**

Which one of these, would you say best describes [*^your/^name*]'s] 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 current economic situation = other  
[WPDES = 95]*

**WPDESA\***

INTERVIEWER: WRITE IN THE OTHER SITUATION.

STRING: 60

*[Open responses to WPDESA were coded and then incorporated into WPDES.]*

END OF FILTER

*IF activity during last month NOT formal educational or training course*

*[WPACT<> 6]*

**WPEDC\***

*[^Have you/Has ^name]] taken a formal educational or training course in the last 12 months?*

- 1 Yes
- 2 No

END OF FILTER

**WPVW\***

How often *[^do you / does ^name]]* do voluntary work? Is it ... READ OUT ...

INTERVIEWER: RESPONDENT SHOULD ANSWER ABOUT CURRENT SITUATION (I.E. THE PAST YEAR).

- 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 ((derived activity status NOT paid work, temporarily away from paid work or waiting to take up paid work already accepted and (age < 70))*

*[/(WPACTW <> 1,2,3)] AND (AGEP <70)]*

*IF derived activity status at last interview = not in paid work*

*[IF (FF\_WpActW = Nowork)]*

**WPJOB\***

Can I just check, *[^have you/has ^name]]* had a paid job since last time we interviewed *[^you/^name]]* *[^on date of last interview]?*

INTERVIEWER: JOB = A PERIOD OF PAID WORK WITH AN EMPLOYER OR A PERIOD OF CONTINUOUS SELF-EMPLOYMENT.

- 1 YES
- 2 NO

ELSE IF

*IF derived activity status at last interview = paid work, temporarily away from paid work or waiting to take up paid work already accepted*

*[/(FF\_WpActW IN [paidw, tempaway, waitwork])]*

**WPJOBL\***

last time we interviewed *[^you were / ^name] was* *[^working/about to start work]* as a *[^job title]*. Is this still *[^your / ^name]'s* most recent job?

INTERVIEWER: JOB = A PERIOD OF PAID WORK WITH AN EMPLOYER OR A PERIOD OF CONTINUOUS SELF-EMPLOYMENT.

- 1 Yes

2 No

END OF FILTER

END OF FILTER

END OF FILTER

*IF (derived activity status = paid work, temporarily away from paid work) and (derived activity status at last interview = paid work, temporarily away from paid work, waiting for work already accepted)*

*[IF (QWPA.Qre).WPActw IN [paidw,tempaway]] AND FF\_WpActw IN [paidw, tempaway, waitwork]]*

**WPSTJ\***

Last time we interviewed [*^you, you were / ^name, ^name*] was [*^working/about to start work*] as a [*^job title*]. Is this still [*^your / ^name's*] main job?

INTERVIEWER: JOB = A PERIOD OF PAID WORK WITH AN EMPLOYER OR A PERIOD OF CONTINUOUS SELF-EMPLOYMENT.

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

IF EQUAL HOURS: MAIN = THE HIGHEST PAID JOB.

INTERVIEWER: IF THE JOB TITLE REMAINS THE SAME BUT THEY HAVE CHANGED EMPLOYMENT STATUS (FROM SELF-EMPLOYED TO EMPLOYEE AND VICE VERSA) CODE NO

1 Yes

2 No

*IF employee status at last interview = employee*

*[IF FF\_WpEsD = Employee]*

**WPEMP\***

[*^Are you/ Is ^name*] still working for the same employer?

INTERVIEWER: IF SELF-EMPLOYED, CODE 'NO'.

1 YES

2 NO

END OF FILTER

END OF FILTER

*IF derived activity status = not in paid work and activity status at last interview not in feed forward data (Not in paid work, NA, DK, RF, New partner)*

*[IF (QWPA.Qre.Wpactw = Nowork) AND (FF\_WpActW =4, 9991, 9998, 9999, empty)]*

**WPEVER\***

[*^Have you/Has ^name*] ever done any paid work?

1 Yes

2 No

END OF FILTER

**WPASKD**

COMPUTED: ASK WPJDO OR NOT

**WPASKE**

COMPUTED: ASK WPEST OR NOT

## WPASKF

COMPUTED: ASK WPDET OR NOT

### Derivation Logic

IF (WPACTW IN [PAIDW, TEMPAWAY, WAITWORK]) AND (FF\_WPACTW = NOWORK OR FF\_WPACTW = 4, 9991, 9998, 9999 or empty)  
THEN WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF (WPACTW IN [WAITWORK])  
THEN WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF WPJOB = YES OR WPJOB1 = NO OR WPSTJ = NO OR WPEVER = YES  
THEN WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF (FF\_xSOC2010 <> SOC2000 AND ((WPJOB1 = YES) OR (WPSTJ = YES AND WPEMP = YES) OR (WPSTJ = YES AND FF\_WPESD <> EMPTY AND FF\_WPESD <> EMPLOYEE)))  
THEN WPASKD:= YES; WPASKE:= YES

IF (FF\_xSOC2010 <> SOC2000 AND FF\_JOBTITLE <> RESPONSE AND ((WPJOB1 = YES) OR (WPSTJ = YES AND WPEMP = YES) OR (WPSTJ = YES AND FF\_WPESD <> EMPTY AND FF\_WPESD <> EMPLOYEE)))  
THEN WPASKF:= YES

IF FF\_xsoc2010 <> SOC2000 AND (WPJOB = NO) AND (FF\_WPEVER = YES)  
THEN WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF WPSTJ = YES AND FF\_WPELSA <> ELSAW1 AND (WPEMP = YES OR (FF\_WPESD <> EMPTY AND FF\_WPESD <> EMPLOYEE))  
THEN WPASKE:= YES

IF WPSTJ = YES AND WPEMP = NO  
THEN WPASKD:= YES; WPASKE:= YES

If whether same main job = no or same employer = no

[(WPSTJ = 2) OR (WPEMP = 2)]

### WPLJOB\*

#### SHOWCARD E3

What were [^your/[name]'s] reasons for leaving [^your/[name]'s] previous [^employer/job]?

INTERVIEWER: CODE ALL THAT APPLY

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 To spend more time with partner/family
- 08 Career progression
- 09 Fed up with job and wanted a change
- 10 Moved to a different area
- 88 To protect own health/health of partner
- 95 Other reason

[Code maximum 12 out of 12 possible responses]



Description	Variable	Archive
Own ill health or disability	WPLJOB1	WPLJOIL
Job was too tiring/stressful	WPLJOB2	WPLJOTI
Ill health or disability of a relative/friend	WPLJOB3	WPLJODI
Company went out of business/site closed down	WPLJOB4	WPLJOCL
Made redundant/dismissed/had no choice	WPLJOB5	WPLJORE
Took voluntary redundancy	WPLJOB6	WPLJOVO
To spend more time with partner/family	WPLJOB7	WPLJOSP
Career progression	WPLJOB8	WPLJOCA
Fed up with job and wanted a change	WPLJOB9	WPLJOFE
Moved to a different area	WPLJOB10	WPLJOMO
Other reason	WPLJOB95	WPLJO95

*If reason for leaving previous job/employer = other*  
 [WPLJOB = 95]

**WPLJOBX\***

WHAT WAS THIS REASON?  
 STRING: 60

**[OPEN RESPONSES TO WPLJOBX ARE CODED AND MERGED WITH THE MULTIPLE RESPONSES TO WPLJOB IN VARIABLES WPLJOMIL WPLJOMTI WPLJOMDI WPLJOMCL WPLJOMRE WPLJOMVO WPLJOMSP WPLJOMCA WPLJOMFE WPLJOMMO WPLJOMBE WPLJOMCF WPLJOMPR WPLJOMER WPLJOMSE WPLJOMSA WPLJOMME WPLJOM85 WPLJOM86]**

END OF FILTER

*IF reason for leaving previous job/employer = response*  
 [WPLJOB = RESPONSE]

*IF more than one reason for leaving previous job*

[WPLJOB.CARDINAL > 1]

\* MERGED AFTER EDIT

**WPLJOBM\***

**SHOWCARD E3**

What was [^your/[^name]'s] main reason for leaving your previous [^employer/job]?

CODE ONE ONLY

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 To spend more time with partner/family
- 08 Career progression
- 09 Fed up with job and wanted a change
- 10 Moved to a different area
- 88 To protect own health/health of partner
- 85 Other answer - not codeable 01 to 10
- 86 Irrelevant response - not codeable 01 to 10
- 95 Other reason

**[CHECK WP2] CHECK:** IF main reason for leaving previous job NOT among selected reasons for leaving previous job at WPLJOB.  
IF (wpljobm <> WPLJOB)  
[^wpljobm] wasn't mentioned at wpljob! Please change!

END OF FILTER

END OF FILTER

END OF FILTER

IF (working status = in paid work, temp away from work or waiting for work) and NOT in the same main job (Wpstj=2).

**WPESP\*\***

[^Is [^name]/ Will [^name] be] READ OUT ...

- 1 ... An employee,
- 2 or, self-employed in main job?

END OF FILTER

**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

**Computation logic**

IF (WPACTW IN [PAIDW,TEMPAWAY,WAITWORK]) AND (FF\_WPACTW = NOWORK OR FF\_WPACTW <> RESPONSE); WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF (WPACTW IN [WAITWORK]); WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF WPJOB = YES OR WPJOB = NO OR WPSTJ = NO OR WPEVER = YES;  
WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF (FF\_xSOC 2010<> SOC2000 AND ((WPJOB = YES) OR (WPSTJ = YES AND WPEMP = YES) OR (WPSTJ = YES AND FF\_WPESD <> EMPTY AND FF\_WPESD <> EMPLOYEE)));  
WPASKD:= YES; WPASKE:= YES

IF (FF\_xSOC2010 <> SOC2000 AND FF\_JOBTITLE <> RESPONSE AND ((WPJOB = YES) OR (WPSTJ = YES AND WPEMP = YES) OR (WPSTJ = YES AND FF\_WPESD <> EMPTY AND FF\_WPESD <> EMPLOYEE)));  
WPASKF:= YES

IF FF\_xSOC2010 <> SOC2000 AND (WPJOB = NO) AND (FF\_WPEVER = YES);  
WPASKD:= YES; WPASKE:= YES; WPASKF:= YES

IF WPSTJ = YES AND FF\_WPELSA <> ELSAW1

IF (WPEMP = YES OR FF\_WPESD <> EMPTY AND FF\_WPESD <> EMPLOYEE));  
WPASKE:= YES

IF WPSTJ = YES AND WPEMP = NO; WPASKD:= YES; WPASKE:= YES

*IF whether current/last main job to report = yes*

*[WPASKF = 1]*

**WPDET**

I'd like to ask some details about [*^your last main job / the main job you were doing last month / the main job you were temporarily away from last month / the main job you are waiting to take up*]. What is the name or title of this job?

INTERVIEWER: JOB = A PERIOD OF PAID WORK WITH AN EMPLOYER OR A PERIOD OF CONTINUOUS SELF-EMPLOYMENT.

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

IF EQUAL HOURS: MAIN = THE HIGHEST PAID JOB.

WRITE IN.

STRING: 60

END OF FILTER

*IF whether current/last main job to report = yes*

*[WPASKD = 1]*

**WPJDO**

[*^I'd like to ask some details about [^your last main job / the main job you were doing last month / the main job you were temporarily away from last month / the main job you are waiting to take up*]. What kind of work [*^did/do/will*] you do most of the time?

INTERVIEWER: IF RELEVANT: WHAT MATERIALS / MACHINERY [*^DID/DO/WILL*] USE?

STRING: 80

**WPQUAL**

What skills or qualifications are needed to do this job?

INTERVIEWER: WRITE IN

STRING: 120

**WPSUP**

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

1 Yes

2 No

END OF FILTER

*IF whether current/last main job to report = yes*

*[WPASKE = 1]*

**WPEST**

[*^Were you/Are you/Will you be*]... READ OUT ...

1 ... An employee,

2 or, self-employed in your main job?

*IF current employee status = employee*

*[WPEST = 1]*

**WPSAL**

Can I just check, [<sup>^</sup>were you/are you/will you be] paid either a salary or wage by an employer in your main job?

- 1 Yes
- 2 No

END OF FILTER

*IF current employee status = self-employed or whether paid a salary or wage = no  
[(WPEST = 2 OR WPSAL = 2)]*

**WPCJB**

(Can I just check) [<sup>^</sup>were you/are you/will you be]...

INTERVIEWER: 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

*[CHECK WP3] CHECK: IF condition of employment = "None of these" AND  
(condition of employment = at least one other answer)*

*[WPCJB= 96 AND WPCJB= any 1 to 7]*

*'NONE' IS AN EXCLUSIVE CODE AT THIS QUESTION. PLEASE CHANGE!*

***[Code maximum 4 out of 7 possible responses]***

Description	Variable	Archive
Paid A Salary Or Wage By Agency	WPCJB1	WPCJAG
A Sole Director Of Your Own Limited Company	WPCJB2	WPCJDI
Running A Business Or Professional Practice	WPCJB3	WPCJBU
A Partner In A Business Or Professional Practice	WPCJB4	WPCJPA
Working For Yourself	WPCJB5	WPCJSE
A Sub-Contractor	WPCJB6	WPCJSC
Doing Freelance Work	WPCJB7	WPCJFR
None Of These	WPCJB96	WPCJ96

END OF FILTER

END OF FILTER

**WPES**

Computed: Employment status

1. Employee
2. Self-employed

**Computation logic**

*IF WPCJB = 1 THEN WPES:= EMPLOYEE*

*IF (WPCJB = 2) OR (WPCJB = 3) OR (WPCJB = 4) OR (WPCJB = 5) OR (WPCJB = 6) OR (WPCJB = 7) THEN WPES:= SELFEMP*

```

IF WPEST = EMPLOY THEN WPES:= EMPLOYEE
IF WPEST = SEMPLOY THEN WPES:= SELFEMP
IF WPEST = DK THEN WPES:= DK
IF WPEST = RF THEN WPES:= RF
IF (WPSTJ = YES AND (WPEMP = YES OR FF_WPESD = DK OR FF_WPESD = REF
FF_WPESD = SELFEMP)) THEN WPES:=FF_WPESD
IF WPESP = RESPONSE THEN WPES:= WPESP
IF WPESP = DK THEN WPES:= DK
IF WPESP = RF THEN WPES:= REF

```

IF current/ last job to report = yes

| [WPASKD = 1]

| IF employment status = employee

| [WPES = 1]

**WPMAKE**

What [<sup>^</sup>did/does] your employer make or do at the place where you [<sup>^</sup>usually worked/usually work/will work]?

STRING: 100

**WPNEMP**

Including yourself, about how many people are employed at the place where you [<sup>^</sup>usually worked/usually work/will work]?

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

END OF FILTER

IF EMPLOYMENT STATUS = SELF-EMPLOYED

| [WPES = 2]

**WMAKS**

What [<sup>^</sup>did/do/will] you make or do in your business?

STRING: 100

**WPEMPL**

[<sup>^</sup>Did/Do/Will] you have any employees?

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

END OF FILTER

END OF FILTER

IF derived activity status = paid work, temporarily away from paid work and  
| employment status = employee

[(WPACTW = 1,2) 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+

END OF FILTER

*If derived activity status = paid work, temporarily away from paid work*

[WPACTW =1,2]

**WPJACT**

**SHOWCARD E4**

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

INTERVIEWER: 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.)

[IF NOT(QWPB.Qre.WpEmp=Yes OR FF\_WpEsd=DK OR  
FF\_WpEsd=REF OR FF\_WpEsd=Selfemp))]

**WPSJOBY**

When did you start your current job?

INTERVIEWER: JOB=PERIOD OF PAID WORK WITH ONE EMPLOYER OR  
PERIOD OF CONTINUOUS SELF-EMPLOYMENT

ENTER YEAR AT THIS QUESTION

RANGE: 1900..2050

*If year started current job = response*

[WPSJOBY = RESPONSE]

**WPSJOBM**

(When did you start your current job?)

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

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August

- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start Of Year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (END OF YEAR)

**[CHECK WP4] SIGNAL:** IF year of start of current job later than year of feed forward data

[WPSJOBY > FWYEAR]

INTERVIEWER: THIS IS LATER THAN [^YEAR OF FEED FORWARD DATA]!  
PLEASE CHECK!

**[CHECK WP5] SIGNAL:** if (year of start of current job – year of date of birth) is less than 14 years

[(IDOB.YEAR - WPSJOBY)<14]

INTERVIEWER: THIS MEANS THAT [^INAME] WAS LESS THAN 14 WHEN HE / SHE STARTED THEIR CURRENT JOB. PLEASE CHECK

**[CHECK WP6] CHECK:** if date of started current job later than the interview date

[ TODATE (WPSJOBY, WPSJOBM.ORD, 1) > SINTDAT

INTERVIEWER: THIS DATE IS IN THE FUTURE ([^WPSJOBM ^WPSJOBY])!  
PLEASE CHANGE!

END OF FILTER

END OF FILTER

**IF DERIVED ACTIVITY STATUS at last interview= NOT IN PAID WORK**

[FF\_WPACTW = 4]

**WPWHYWK**

What were your reasons for starting working?

- 1 I needed the money
- 2 My own health improved
- 3 Health of relative/friend improved
- 4 For enjoyment/company at work
- 5 I was able to find a suitable job
- 95 Other reason

**[Code maximum 6 out of 6 possible responses]**

Description	Variable	Archive
I needed the money	WPWHYWK1	WPWYWMO
My own health improved	WPWHYWK2	WPWYWOH
Health of relative/friend improved	WPWHYWK3	WPWYWRH
For enjoyment/company at work	WPWHYWK4	WPWYWEN
I was able to find a suitable job	WPWHYWK5	WPWYWSU
Other reason	WPWHYWK95	WPWYW95

IF reason started working = other [WPWHYWK = 95]

**WPWHYWKX**

What was this other reason?

STRING: 60

**[OPEN RESPONSES TO WPWHYWKX ARE CODED AND MERGED WITH THE MULTIPLE RESPONSES TO WPWHYWK. THESE MERGED RESPONSES ARE RECODED IN VARIABLES WPWYWMMO WPWYW MOH WPWYWMRH WPWYWMMEN WPWYWMSU WPWYWMMHH WPWYWMMCH WPWYWMMFI WPWYWMMHE WPWYWMM85 WPWYWMM86]**

END OF FILTER

END OF FILTER

*IF NOT(QWPB.Qre.WpEmp = Yes OR FF\_WpEsd = DK OR  
FF\_WpEsd = REF OR FF\_WpEsd = Selfemp)*

**WPWHYJB**

What were your reasons for taking this job?

INTERVIEWER: CODE ALL THAT APPLY

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me
- 06 Started own business/become self-employed
- 07 Started work in family business
- 08 Was the only job i could get
- 09 Was the first job i found
- 95 Other

**[Code maximum 10 out of 10 possible responses]**

Description	Variable	Archive
The pay was enough	WPWHYJB1	WPWHYJPA
The hours suited me	WPWHYJB2	WPWHYJHO
Could come to and/or leave work at times that suited me	WPWHYJB3	WPWHYJTI
To progress my career	WPWHYJB4	WPWHYJCA
The content of the job suited me	WPWHYJB5	WPWHYJCO
Started own business/become self-employed	WPWHYJB6	WPWHYJBU
Started work in family business	WPWHYJB7	WPWHYJFB
Was the only job I could get	WPWHYJB8	WPWHYJON
Was the first job I found	WPWHYJB9	WPWHYJFI
Other	WPWHYJB95	WPWHYJ95

*IF reason for taking job = other [WPWHYJB = 95]*

**WPWYJBX**

What was this reason?

STRING: 60

**[OPEN RESPONSES TO WPWYJBX ARE CODED AND MERGED WITH THE MULTIPLE RESPONSES TO WPWYJB. THESE MERGED RESPONSES ARE RECODED IN VARIABLES:  
WPWYJMPA WPWYJMHO WPWYJMTI WPWYJMCA WPWYJMCO]**



**WPWYJMBU WPWYJMFB WPWYJMON WPWYJMFJ WPWYJMLO  
WPWYJMBC WPWYJMTO WPWYJMCH WPWYJMMO WPWYJMHH  
WPWYJMPH WPWYJMHF WPWYJM85 WPWYJM86]**

END OF FILTER

*IF reason for taking job = response more than one reason for taking job  
[WPWHYJB=RESPONSE AND CARDINAL(WPWHYJB)>1]*

**WPWHYJBM**

What was your main reason for taking this job?

INTERVIEWER: CODE ONE ONLY

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me
- 06 Started own business/become self-employed
- 07 Started work in family business
- 08 Was the only job i could get
- 09 Was the first job i found
- 95 Other

*[CHECK WP7] CHECK: IF main reason for taking present job NOT among  
selected reasons for taking present job at WPWHYJB.*

*IF (WPWHYJBM <> WPWHYJB)*

*[^WPWHYJBM] WASN'T MENTIONED AT WPWHYJB! PLEASE CHANGE!*

*PROGRAMMING NOTE: If one reason for taking job [CARDINAL(WPWHYJB)=1]  
compute WpWhyJbM = WpWhyJb*

END OF FILTER

END OF FILTER

*if employment status = employee [WPES =1]*

**WPCJOB**

(Can I just check,) 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?

*If derived activity status = paid work [WPACTW=1]*

**WPHJOBL**

How many hours did you work in this job last week (excluding meal breaks but including any paid overtime)?

RANGE: 0.168

END OF FILTER

**WPHJOB**

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

INTERVIEWER: IF RESPONDENT DOES NOT WORK EVERY WEEK, PLEASE  
DIVIDE MONTHLY HOURS BY 4 AND ENTER THIS NUMBER  
RANGE: 1..168

*[CHECK WP8] SIGNAL: IF hours worked per week greater than 70  
[WPHJOB > 70]*

INTERVIEWER: THAT SEEMS HIGH ([^WPHJOB] HOURS), CAN I CHECK?

END OF FILTER

*IF employment status = self-employed [WPES =2]*

*IF derived activity status = paid work [WPACTW=1]*

**WPHWRKL**

How many hours did you work last week, including doing the books, VAT and so on?

RANGE: 1..168

END OF FILTER

**WPHWRK**

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

RANGE: 1..168

*[CHECK WP9] SIGNAL: IF hours worked per week greater than 70  
[WPHWRK >70]*

INTERVIEWER: THAT SEEMS HIGH ([^WPHWRK] HOURS), CAN I CHECK?

END OF FILTER

END OF FILTER

*If (employment status = employee) and (usual hours worked per week < 30)  
[WPES = 1 AND WPHJOB < 30]*

**WPPTY**

Why do you usually work part-time in this job? Is it because you...

1. Were not offered more hours or could not find a full-time job
2. Do not want a full time job

END OF FILTER

*If (employment status = self-employed) and (usual hours worked per week < 30)  
[WPES = 2 AND WPHWRK < 30]*

**WPPTYB**

Why do you not usually work more hours? Is it because you...

1. Cannot usually get more hours of work
2. Do not want to work more hours

END OF FILTER

*IF (reason for working part-time = do not want a full-time job) or (reason for not  
working more hours = do not want to work more hours)  
[WPPTY = 2 OR WPPTYB = 2]*

**WPPTYD**

Is that because... READ OUT...

INTERVIEWER: CODE ALL THAT APPLY

1. Your health prevents you from working full time
2. You are financially secure but work because you want to
3. You earn enough working part time
4. You want to spend more time with family
5. You have domestic commitments which prevent working full time
6. Other reason

END OF FILTER

*If (employment status = employee)*

[WPES = 1]

**WPFLEX**

Some people have special working hours arrangements that vary daily or weekly. In this job is your agreed working arrangement any of the following...

1. Flexitime (flexible working hours)
2. An annualised hours contract
3. Term-time working
4. Zero hours contract
5. On-call working
6. Or none of these

END OF FILTER

*IF (employment status = employee) or employment status = self-employed*

[WPES = 1, 2]

**WPSHIFT**

Do you [(if WPES = 1) work/(if WPES = 2) do shift work] outside the hours of 7am to 7pm in this job?

1. Most of the time
2. Occasionally
3. Never

END OF FILTER

*IF derived activity status = paid work, temporarily away from paid work or waiting to take up paid work already accepted*

[WPACTW = 1, 2, 3]

**WPHOMWRK**

To what extent, if any, is it currently possible for you to perform your main job role from home or another remote location?

INTERVIEWER: It will be possible where employees currently have the necessary technology to enable them to work from home

- 1 All of my job can be performed from home/remotely
- 2 Most of my job can be performed from home/remotely
- 3 Some of my job can be performed from home/remotely
- 4 My job cannot be performed from home/remotely

IF WPHOMWRK=1..3 AND WPaway<>3

**WPREMOT2**

How many hours do you work from home or another remote location in a usual week?

Remote working includes working outside of a traditional office or 'central' place of work. It includes working at home and close to home in your local community.

INTERVIEWER: If the individual works an irregular working pattern, they should consider 'usual' as what would be typical with reference to the last 4 weeks.

Range 0...168

END OF FILTER

**WPCOM**

In your main job, where is the place you currently mainly work?

INTERVIEWER: IF TEMPORARILY DIFFERENT TO WHERE NORMALLY WORKS (E.G. WORKING FROM HOME) CODE WHERE CURRENTLY WORKS.

1. At the employer's or own premises
2. At home
3. At the premises or homes of clients
4. At no locally fixed place (e.g. vehicle)
5. Another kind of place

END OF FILTER

IF place mainly work = at the employer's own premises

[WPCOM = 1]

**WPCOMT**

How long does it usually take you to travel from home to your main place of work?"  
RECORD TIME IN MINUTES.

**WPCOMM**

How do you usually travel to work?

INTERVIEWER: CODE MAIN MEANS OF TRAVEL ONLY

1. Private motor vehicle (car/van/minibus/works van/motorbike/moped/scooter)
2. Public transport (bus/coach/private bus/ railway train/underground train/'light' railway/tram)
3. Walk
4. Bicycle
5. Other

END OF FILTER

IF derived activity status <> paid work, temporarily away from paid work AND whether had a paid job since last interview = yes, dk, rf) or (job last wave still most recent job <> empty) or (whether ever done paid work = yes, dk, ref)

[[WPACTW <>1,2) AND ((WPJOB = 1, DK, RF) OR (WPJOBL <> EMPTY)  
OR (WPEVER = 1, DK, RF)]]

**WPWLY**

Have you done any regular paid work in last 12 months, that is since [^date a year ago]?

- 1 Yes
- 2 No

END OF FILTER

*IF (derived activity status = paid work, temporarily away from paid work) or regular paid work in last 12 months = yes)*

*[(WPACTW = 1,2) OR (WPWLY = 1)]*

**WPWLYM**

How many weeks were you [<sup>^</sup>in employment/actively self-employed] during the last 12 months, that is since [<sup>^</sup>date a year ago] [<sup>^</sup>, including any periods of paid leave]?

INTERVIEWER: COUNT EACH WEEK RESPONDENT WAS IN EMPLOYMENT – EVEN IF ONLY WORKED FOR PART OF THE WEEK.

RANGE: 1..52

**WPHLY**

How many weeks leave did you take in the last 12 months?

RANGE: 0..52

END OF FILTER

*IF regular paid work in last 12 months = yes*

*[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 WP10] SIGNAL: if gross amount of income in past year greater than £100,000*

*[WPWLYY > 100,000 ENG]*

INTERVIEWER: ARE YOU SURE? £[<sup>^</sup>WPWLYY] SEEMS HIGH - PLEASE CHECK.

*IF regular paid work in last 12 months = dk, ref*

*[WPWLY = DK, RF]*

**WPWLYB**

Did it amount to.....

BRACKETS (5000, 10000, 20000, 50000)

**[BRACKET RESULTS ARE RECODED IN WPWLYYL, WPWLYYU, WPWLYYE, WPWLYYR]**

END OF FILTER

END OF FILTER

*IF (paid work since last interview = yes) or (still in paid work = yes) or (still in paid work = no) or (ever had paid work = yes)*

*[(WPJOB = 1) OR (WPJOB1 = 1)) OR (WPJOB1 = 2) OR (WPEVER = 1)]*

**WPLLSY**

When did your last job start?

INTERVIEWER: JOB = A PERIOD OF PAID WORK WITH AN EMPLOYER OR A PERIOD OF CONTINUOUS SELF-EMPLOYMENT.

INTERVIEWER: ENTER THE YEAR AT THIS QUESTION.

RANGE: 1900..2050

*[CHECK WP11] SIGNAL: IF year of start of last job later than year of feed forward data*

*[WPLLSY > FWYEAR]*

INTERVIEWER: THIS IS LATER THAN [*^YEAR OF FEED FORWARD DATA*]!  
PLEASE CHECK!

*If year started last job = response*

*[WPLLSY = RESPONSE]*

**WPLLSM**

(when did your last job start?)

INTERVIEWER: CODE THE MONTH AT THIS QUESTION.

IF DOESN'T KNOW MONTH, CODE SEASON.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start Of Year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (End Of Year)

END OF FILTER

**WPLLJY**

When did your last job end?

INTERVIEWER: JOB = A PERIOD OF PAID WORK WITH AN EMPLOYER OR A PERIOD OF CONTINUOUS SELF-EMPLOYMENT.

INTERVIEWER: ENTER THE YEAR AT THIS QUESTION.

RANGE: 1900..2050

*[CHECK WP12] CHECK: IF year when last job ended before the date of birth*

*[WPLLJY < IDOB.YEAR]*

EDIT: WPLLJY (*[^WPLLJY]*) IS BEFORE RESPONDENT'S YEAR OF BIRTH (*[^IDOB]*).

*[CHECK WP13] SIGNAL: if year when last job ended later than year of feed forward data.*

*IF [WPLLJY > FWYEAR]*

INTERVIEWER: THIS IS LATER THAN [*^YEAR OF FEED FORWARD DATA*]!  
PLEASE CHECK!

*IF year last job ended = response and year last job ended >1990*

*[(WPLLJY = RESPONSE) AND (WPLLJY > 1990)]*

**WPLLJM**

(when did your last job end?)

INTERVIEWER: CODE THE MONTH AT THIS QUESTION.  
IF DOESN'T KNOW MONTH, CODE SEASON.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start Of Year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (End Of Year)

*[CHECK WP14] CHECK: IF date when last job ended before date when last job started*

*IF [(todate (wplljy, wplljm.ord, 1) < (todate (wpllsy, wpllsm.ord, 1))*

*INTERVIEWER: THE JOB ENDED BEFORE IT BEGAN! PLEASE CHANGE!*

END OF FILTER

*IF current economic situation <> retired, semi-retired*

*IF (WPJob=Yes OR WPJob=Yes OR WPJob=No OR WPEver=Yes)*

*AND NOT (WpDes IN [retire,semi]) | |*

**WPYSTP**

**SHOWCARD E5**

What were [*your/[^name]'s*] reasons for stopping working?

INTERVIEWER: CODE ALL THAT APPLY

IF RESPONDENT SAYS THE PANDEMIC, PROBE FOR MORE DETAILS AND  
CODE ACCORDINGLY

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 88 To protect my own health/health of my partner
- 95 Other reason

***[Code maximum 15 out of 15 possible responses]***

Description	Variable	Archive
Own ill health or disability	WPYSTP1	WPYSTOH
Working was too tiring/stressful	WPYSTP2	WPYSTTI
Ill health or disability of a relative/friend	WPYSTP3	WPYSTRH
Company went out of business/site closed down	WPYSTP4	WPYSTOU
Made redundant/dismissed/had no choice	WPYSTP5	WPYSTRE
Took voluntary redundancy	WPYSTP6	WPYSTVR
Could not find another job	WPYSTP7	WPYSTFI
Could afford to stop working	WPYSTP8	WPYSTAF
To spend more time with partner/family	WPYSTP9	WPYSTFA
To enjoy life while still fit and young enough	WPYSTP10	WPYSTEN
Fed up with working and wanted a change	WPYSTP11	WPYSTCH
To stop working at same time as husband/wife/partner	WPYSTP12	WPYSTPA
To give young generation a chance	WPYSTP13	WPYSTYO
Moved to a different area	WPYSTP14	WPYSTMO
Other reason	WPYSTP95	WPYST95

*IF reason stopped work = other*  
*[WPYSTP =95]*

**WPYSTPX**

what was this reason?  
STRING: 60

**[OPEN RESPONSES TO WPYSTPX ARE CODED AND WHERE POSSIBLE  
MERGED WITH THE MULTIPLE RESPONSES TO WPYSTP]**

Description (Merged Variables)	Variable	Archive
Own ill health or disability	WPYSTM1	WPYSTM OH
Working was too tiring/stressful	WPYSTM2	WPYSTM TI
Ill health or disability of a relative/friend	WPYSTM3	WPYSTM RH
Company went out of business/site closed down	WPYSTM4	WPYSTM OU
Made redundant/dismissed/had no choice	WPYSTM5	WPYSTM RE
Took voluntary redundancy	WPYSTM6	WPYSTM VR
Could not find another job	WPYSTM7	WPYSTM FI
Could afford to stop working	WPYSTM8	WPYSTM AF
To spend more time with partner/family	WPYSTM9	WPYSTM FA
To enjoy life while still fit and young enough	WPYSTM10	WPYSTM EN
Fed up with working and wanted a change	WPYSTM11	WPYSTM CH
To stop working at same time as husband/wife/partner	WPYSTM12	WPYSTM PA
To give young generation a chance	WPYSTM13	WPYSTM YO
Moved to a different area	WPYSTM14	WPYSTM MO
Contract ran out	WPYSTM15	WPYSTM CO
Reached retirement age	WPYSTM16	WPYSTM AG
Wanted to study	WPYSTM17	WPYSTM ST
Other answer - not codeable 01-1	WPYSTM85	WPYSTM85
Irrelevant response - not codeable 01-17	WPYSTM86	WPYSTM86

END OF FILTER

*IF reason stopped work = response*  
*[WPYSTP = RESPONSE]*

*IF more than one reason for stopping work*



[WPYSTP.CARDINAL > 1]

**WPYSTPM  
SHOWCARD E5**

What was your main reason for stopping working?

INTERVIEWER: IF RESPONDENT SAYS THE PANDEMIC, PROBE FOR MORE DETAILS AND CODE ACCORDINGLY

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 88 To protect my own health/health of my partner
- 95 Other reason

*[CHECK WP15] CHECK: if main reason for stopping working NOT among selected reasons for stopping working at WPYSTP*

*IF [WPYSTPM <> WYPYSTP]*

*'MAIN' REASON WAS NOT GIVEN AS A REASON AT WPYSTP. PLEASE CHANGE!*

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*If (previously interviewed) and (still in paid work <> yes) and (((date started last job reported) and (date of last interview < date started last job)) or ((same employer = no) and (started current job = response) and (date of last interview < date started current job)))*

*[IF (PREVDATE[PNUM] = RESPONSE) AND (WPJOB1 <> 1) AND (((WPLLSY = RESPONSE) AND WPLLSM IN [JANUARY .. DECEMBER]) AND (PREVDATE < (TODATE (WPLLSY, WPLLSM, 1)+(0, 1, 0)))) OR (((WPEMP = 2) AND (WPSJOB1 = RESPONSE)) AND (WPSJOB1 IN [JANUARY .. DECEMBER])) AND (PREVDATE < (TODATE (WPSJOB1, WPSJOB1, 1)+(0, 1, 0))))]*

LOOP FOR KK:= 1 TO 5 [LOOP FOR UP TO 5 PREVIOUS JOBS]

*IF (KK = 1) OR ((KK > 1) AND (((QSTEND[KK - 1].WPOWB = NO) OR (QSTEND[KK - 1].WPOWB = DK)) OR (QSTEND[KK - 1].WPOWB = RF)))  
[KK = 1 OR KK > 1 AND QSTENDKK - 1.WPOWB = NO OR QSTENDKK - 1.WPOWB = DK OR QSTENDKK - 1.WPOWB = RF]*

**WPOJ**

Did you have another job before this one?

- 1 Yes
- 2 No

*IF whether had previous job = yes*  
*[WPOJ = 1]*

**WPOWB**

Were you working in this job at the time of the last interview?  
INTERVIEWER: IF ONLY WORKED IN THIS JOB BEFORE DATE OF LAST INTERVIEW ENTER 'NO'.

- 1 Yes
- 2 No

*IF working in previous job at time of last interview = no*  
*[WPOWB = 2]*

**WPLPSY**

When did this job start?  
INTERVIEWER: JOB = A PERIOD OF PAID WORK WITH AN EMPLOYER OR A PERIOD OF CONTINUOUS SELF-EMPLOYMENT.  
INTERVIEWER; ENTER THE YEAR AT THIS QUESTION.  
RANGE: 1900..2050

*[CHECK WP16] SIGNAL: IF year job started later than year of feed forward data*

*IF [wplpsy > fwyear]*

INTERVIEWER: THIS IS LATER THAN [**^ YEAR OF FEED FORWARD DATA!**]  
PLEASE CHECK!

*IF start of job = response [WPLPSY = RESPONSE]*

**WPLPSM**

(when did this job start?)  
INTERVIEWER: CODE THE MONTH AT THIS QUESTION. IF DOESN'T KNOW MONTH, CODE SEASON

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start Of Year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (End Of Year)

*[CHECK WP17] SIGNAL: IF date job started before date of last interview*

*IF [todate (wplpsy, wplpsm.ord, 1) < prevdate (0, 1, 0)]*

INTERVIEWER: PLEASE CHECK! [**^MONTH JOB STARTED ^YEAR JOB STARTED]** IS BEFORE THE LAST INTERVIEW!

END OF FILTER

END OF FILTER

**WPLPEY**

When did this job end?

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

INTERVIEWER: ENTER THE YEAR AT THIS QUESTION.

RANGE: 1900..2050

*[CHECK WP18] SIGNAL: IF year job ended later than year of feed forward data*

*IF [wplpey > fwyear]*

INTERVIEWER: THIS IS LATER THAN [^YEAR OF FEED FORWARD DATA]!  
PLEASE CHECK!

*IF END OF JOB = RESPONSE [WPLPEY = RESPONSE]*

**WPLPEM**

(when did this job end?)

INTERVIEWER: CODE THE MONTH AT THIS QUESTION. IF DOESN'T  
KNOW MONTH, CODE SEASON.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start Of Year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (End Of Year)

*[CHECK WP19] CHECK: IF date job ended before date when job started*

*[todate (wplpey, wplpem.ord, 1) < todate (wplpsy, wplpsm.ord, 1)]*

INTERVIEWER: THE JOB ENDED BEFORE IT BEGAN! PLEASE CHANGE!

END OF FILTER

END OF FILTER

END OF FILTER

END OF LOOP

END OF FILTER

**ABVSPA**

Computed: Whether respondent is at or above state pension age [depends on sex and DOB].

1. Yes
2. No

IF (current economic situation = employed, self-employed, waiting for job)  
[WPACTW=1,2,3]

**WPJOBS**

"How worried, if at all, are you about your job security?"

1. Not at all worried
2. Not very worried
3. Somewhat worried
4. Very worried
5. Extremely worried
6. Not applicable

END OF FILTER

IF (current economic situation NOT employed, self-employed) and (derived activity status = not in paid work

[ (WPDES = 1, 4, 5, 6, 95, 96, -8, -9) AND WPACTW = 4]

**WPEXPW**

Do you expect to do any paid work in the future?

1. YES
2. NO

END OF FILTER

IF (current economic situation = employed, self-employed) or (derived activity status = paid work, temporarily away from paid work or waiting to take up paid work already accepted) or (expect to do paid work = yes)

[WPDES = 2, 3 OR WPACTW = 1, 2, 3 OR WPEXPW = 1]

**WPRETEX**

At what age do you expect to [^fully retire/retire]?

RANGE: 16..110

END OF FILTER

IF derived activity status = paid work, temporarily away

[WPACTW = 1,2]

IF whether health limits paid work = yes

[HELWK =1]

**WPLIMWK**

You mentioned earlier that you have a health problem or disability that limits the kind or amount of paid work you can do, does this health problem or disability limit the kind or amount of work you can do in your current job?

- 1 Yes
- 2 No

END OF FILTER

**WPLNJ**

Can I just check, are you currently looking for [<sup>^</sup>any kind of paid work/a new job]?

- 1 Yes
- 2 No

*IF currently looking for work = yes*

*[WPLNJ = 1]*

**WPWHYNJ**

**SHOWCARD E6**

What are the reasons for trying to leave your current job?

INTERVIEWER: IF RESPONDENT SAYS THE PANDEMIC PROBE FOR MORE DETAILS AND CODE ACCORDINGLY

- 01 Own ill health or disability
- 02 Job too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company going out of business/site closing down
- 05 Being made redundant/dismissed/have no choice
- 06 Taking voluntary redundancy
- 07 To spend more time with partner/family
- 08 Fed up with job and want a change
- 09 Fed up with employer/colleagues and want a change
- 10 To progress my career
- 11 To earn more money
- 12 Moving to a different area
- 88 To protect my own health/health of my partner
- 95 Other reason

***[Code maximum 13 out of 13 possible responses]***

Description	Variable	Archive
Own ill health or disability	WPWHYNJ1	WPWYNOH
Job too tiring/stressful	WPWHYNJ2	WPWYNTI
Ill health or disability of a relative/friend	WPWHYNJ3	WPWYNRH
Company going out of business/site closing down	WPWHYNJ4	WPWYNOU
Being made redundant/dismissed/have no choice	WPWHYNJ5	WPWYNRE
Taking voluntary redundancy	WPWHYNJ6	WPWYNVR
To spend more time with partner/family	WPWHYNJ7	WPWYNFA
Fed up with job and want a change	WPWHYNJ8	WPWYNCH
Fed up with employer/colleagues and want a change	WPWHYNJ9	WPWYNEM
To progress my career	WPWHYNJ10	WPWYNCA
To earn more money	WPWHYNJ11	WPWYNEA
Moving to a different area	WPWHYNJ12	WPWYNMO
Other reason	WPWHYNJ95	WPWYN95

*If reason for trying to leave current job = other*

*[WPWHYNJ = 95]*

**WPWYNJX**

What was this other reason?

STRING: 60

**OPEN RESPONSES TO WPWHYNJ ARE CODED AND WHERE POSSIBLE  
MERGED WITH MULTIPLE RESPONSES TO WPWYNJX IN VARIABLES:**

Description (Merged Variables)	Variable	Archive
Own ill health or disability	WPWYNJM1	WPWYNMOH
Working was too tiring/stressful	WPWYNJM2	WPWYNMTI
Ill health or disability of a relative/friend	WPWYNJM3	WPWYNMRH
Company went out of business/site closed down	WPWYNJM4	WPWYNMOU
Being made redundant/dismissed/have no choice	WPWYNJM5	WPWYNMRE
Taking voluntary redundancy	WPWYNJM6	WPWYNMVR
To spend more time with partner/family	WPWYNJM7	WPWYNMFA
Fed up with job and want a change	WPWYNJM8	WPWYNMCH
Fed up with employer/colleagues and want a change	WPWYNJM9	WPWYNMEM
To progress my career	WPWYNJ22	WPWYNMCA
To earn more money	WPWYNJ23	WPWYNMEA
Moving to a different area	WPWYNJ24	WPWYNMMO
Contract is running out/job was temporary	WPWYNJ25	WPWYNMCO
Company reorganization/change in management	WPWYNJ26	WPWYNMOR
Not challenging or demanding enough	WPWYNJ27	WPWYNMDE
Looking for longer hours	WPWYNJ28	WPWYNMLH
Wants a job local/nearer to home	WPWYNJ29	WPWYNMLO
Planning to go abroad	WPWYNJ30	WPWYNJAB
Other answer - not codeable 01-18	WPWYNJ32	WPWYNM85
Irrelevant response - not codeable 01-18	WPWYNJ33	WPWYNM86

END OF FILTER

*IF reason trying to leave current job = response and more than one reason to leave  
[[WPWHYNJ = RESPONSE) AND (WPWHYNJ.CARDINAL > 1)]*

**WPMYNJ**

**SHOWCARD E6**

What is the main reason for trying to leave your current job?

INTERVIEWER: IF RESPONDENT SAYS THE PANDEMIC PROBE FOR  
MORE DETAILS AND CODE ACCORDINGLY

- 01 Own ill health or disability
- 02 Job too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company going out of business/site closing down
- 05 Being made redundant/dismissed/have no choice
- 06 Taking voluntary redundancy
- 07 To spend more time with partner/family
- 08 Fed up with job and want a change
- 09 Fed up with employer/colleagues and want a change
- 10 To progress my career
- 11 To earn more money
- 12 Moving to a different area
- 88 To protect my own health/health of my partner
- 95 Other reason

END OF FILTER

END OF FILTER

END OF FILTER

*IF main reason away from work = sick and employment status= employee*  
*[(WPTAW = 2) AND (WPES = 1)]*

**WPSPAY**

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

- 1 Yes
- 2 No

END OF FILTER

*IF employment status = employee and derived activity status = paid work, temporarily away from paid work*  
*[(WPES = 1) AND (WPACTW=1,2)]*

**WPOTP\***

How much [*^are you/is ^name*] 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?

INTERVIEWER: IF ON TEMPORARILY REDUCED HOURS/PAY CODE THEIR CURRENT ACTUAL PAY RECEIVED (E.G. LAST PAY PERIOD).

INTERVIEWER: CODE PERIOD COVERED.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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 frequency paid = response*  
*[WPOTP = RESPONSE]*

**WPAOTP\***

INTERVIEWER:ENTER AMOUNT.

ROUND TO NEAREST £.

RANGE: 0..9999997

*[CHECK WP20] SIGNAL: IF gross amount paid per week is greater than £3,000 OR IF gross amount paid every two weeks is greater than £6,000 OR IF gross amount paid every 4 weeks/month is greater than £12,000 OR IF gross amount paid is greater than £150,000 AND any other time-frame is selected*

*IF [(wpotp = 1 and wpaotp > 3000) or (wpotp = 2 and wpaotp > 6000) or (wpotp = 4 OR 5 AND wpaotp > 12000) or (wpotp = 3, 7 - 10, 13, 26, 52, 90,95 AND*

*wpaotp > 150000]*

INTERVIEWER: ARE YOU SURE? £[<sup>^</sup>GROSS AMOUNT PAID] SEEMS HIGH - PLEASE CHECK.

END OF FILTER

*If frequency paid = dk, rf or amount paid = dk, rf*

*[((WPOTP = DK) OR (WPOTP = RF)) OR ((WPAOTP =DK) OR (WPAOTP = RF))*

*IF FREQUENCY PAID = ONE WEEK [WPOTP = 1]*

**WPAOWB\***

Is it.....

BRACKETS (200, 300, 500, 1500)

*[bracket results are recoded in WPAOTWL WPAOTWU WPAOTWE*

*WPAOTWR]*

END OF FILTER

*If frequency paid = two weeks*

*[WPOTP = 2]*

**WPAOFB\***

Is it.....

BRACKETS (400, 600, 1000, 3000)

*[bracket results are recoded IN WPAOTFL WPAOTFU WPAOTFE WPAOTFR]*

END OF FILTER

*If frequency paid = four weeks, calendar month*

*[WPOTP = 4, 5]*

**WPAOMB\***

Is it.....

BRACKETS (800, 1200, 2000, 6000)

*[Bracket results are recoded in WPAOTML WPAOTMU WPAOTFME*

*WPAOTMR]*

END OF FILTER

*If frequency paid = yearly, one off*

*[WPOTP = 52, 95]*

**WPAOYB\***

Is it.....

BRACKETS (10000, 15000, 25000, 75000)

*[Bracket results are recoded in WPAOTYL WPAOTYU WPAOTFYE*

*WPAOTYR]*

END OF FILTER

*If frequency paid <>one week, two weeks, four weeks, calendar month, yearly, one off*

*[WPTOP <> 1, 2, 4, 5, 52, 95]*

**WPAOOB\***

Is it.....



BRACKETS (800, 1200, 2000, 6000)  
[Bracket results are recoded in wpaotol WPAOTOU WPAOTOE  
WPAOTOR]

END OF FILTER

END OF FILTER

**WPPERI\***

Thinking about the last time [^you/he/she] [^were/was] paid, what period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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/name's] pay. Do you have [^your/his/her] last payslip to hand which you could consult?

INTERVIEWER: ASK OR CODE.

- 01 Latest payslip consulted
- 02 Old payslip consulted
- 03 Payslip not consulted
- 04 No payslip provided by employer

*IF frequency paid last time = response*

*[WPPERI = RESPONSE]*

**WPTH\***

What was [^your/his/her] take-home pay last time, that is after any deductions were made for tax, national insurance, pensions, union dues etc?

INTERVIEWER: ENTER AMOUNT. ROUND TO THE NEAREST £.

RANGE: 0..9999997

*[CHECK WP21] SIGNAL: IF amount of last take-home pay per week is greater than £2,000 OR*

*IF amount of last take-home pay for two weeks is greater than £4,000 OR*

*IF amount of last take-home pay for four weeks/one month is greater than £8,000*

*OR*

*amount of take-home pay is greater than £100,000 and any other time-period is selected.*

*IF [(wpperi=1 and wpthp >2000) OR (wpperi=2 and wpthp > 4000) OR (wpperi=4 or 5 AND wpthp > 8000) or wpperi = [3, 7 - 10, 13, 26, 52, 90, 95] AND wpthp > 100000]*

INTERVIEWER: ARE YOU SURE? £[^AMOUNT OF LAST TAKE-HOME PAY]  
SEEMS HIGH - PLEASE CHECK.

END OF FILTER

*If take home pay last time = dk, rf or frequency paid last time = DK, RF*  
[(WPTHP = DK) OR (WPTHP = RF) OR (WPPERI = DK) OR (WPPERI = RF)]

*if frequency paid last time = one week*  
[WPPERI = 1]

**WPTHPWB\***

Was it.....

BRACKETS (125, 200, 350, 1000)

[bracket results are recoded in WPTHPWL WPTHPWU WPTHPWE WPTHPWR]

END OF FILTER

*If frequency paid last time = twoweek [WPPERI = 2]*

**WPTHPFB\***

Was it.....

BRACKETS (250, 400, 700, 2000)

[bracket results are recoded in WPTHPFL WPTHPFU WPTHPFE | | ]

WPTHPFR]

END OF FILTER

*If frequency paid last time = four weeks, calendar month*  
[WPPERI = 4, 5]

**WPTHPMB\***

Was it.....

BRACKETS (500, 800, 1400, 4000)

[BRACKET RESULTS ARE RECODED IN WPTHPML WPTHPMU WPTHPME  
WPTHPMR]

END OF FILTER

*If frequency paid last time = yearly, one off [WPPERI = 52, 95]*

**WPTHPYB\***

Was it.....

BRACKETS (6000, 10000, 17500, 50000)

[BRACKET RESULTS ARE RECODED IN WPTHPYL WPTHPYU WPTHPYE  
WPTHYR]

END OF FILTER

*If frequency paid <>one week, two weeks, four weeks, calendar month, yearly, one  
off*

[WPPERI <> 1, 2, 4, 5, 52, 95]

**WPTHPOB\***

Was it.....

BRACKETS (500, 800, 1400, 4000)

[Bracket results are recoded in WPTHPOL WPTHPOU WPTHPOE WPTH0R]

END OF FILTER

END OF FILTER

*If take home pay last time = response [WPTHP = RESPONSE]*

**WPTHL\***

Is this [*^your/^name*]'s usual take home pay?

- 1 Yes
- 2 No

*IF USUAL TAKE HOME PAY = NO [WPTHL = NO]*

**WPUP\***

How much [*^are you/is he/she*] usually paid?

INTERVIEWER: CODE PERIOD COVERED.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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 frequency of usual take home pay = response  
[WPUP = RESPONSE]*

**WPUPA\***

INTERVIEWER: ENTER AMOUNT.

ROUND TO NEAREST £.

RANGE: 0..9999997

*[CHECK WP22] CHECK: IF amount usually paid per week is greater than £2,000  
OR*

*Amount usually paid every 2 weeks is greater than £4,000 OR*

*Amount usually paid every 4 weeks/calendar month is greater than £8,000 or*

*Amount usually paid is greater than £10,000 and any other time period is  
selected*

*[((wpup = 1 and wpupa > 2000) or (wpup = 2 and wpupa > 4000) or (wpup =  
4 or 5 and wpupa > 8000) or (wpup = [3, 7 - 10, 13, 26, 52, 90, 95] and wpupa  
> 10000))]*

*INTERVIEWER: ARE YOU SURE? £[*^AMOUNT USUALLY PAID*] SEEMS HIGH  
- PLEASE CHECK.*

END OF FILTER

*IF frequency of usual take home pay = dk, rf or amount of usual take home pay =  
DK,RF)*

[(WPUP = DK) OR (WPUP = RF) OR (WPUPA = DK) OR (WPUPA = RF)]

If frequency of usual take home pay = one week [WPUP = 1]

**WPUPAWB\***

Would it be.....

BRACKETS (125, 200, 350, 1000)

[Bracket results are recoded IN WPUPAWL WPUPAWU WPUPAWE  
WPUPAWR]

END OF FILTER

If frequency of usual take home pay = two weeks [WPUP = 2]

**WPUPAFB\***

Would it be.....

BRACKETS (250, 400, 700, 2000)

[Bracket results are recoded in WPUPAFL WPUPAWU WPUPAWE  
WPUPAWR]

END OF FILTER

If frequency of usual take home pay = four weeks, calendar month  
[WPUP = 4, 5]

**WPUPAMB\***

Would it be.....

BRACKETS (500, 800, 1400, 4000)

[BRACKET RESULTS ARE RECODED IN WPUPAML WPUPAMU  
WPUPAME WPUPAMR]

END OF FILTER

If frequency of usual take home pay = yearly, one off  
[WPUP = 52, 95]

**WPUPAYB\***

Would it be.....

BRACKETS (6000, 10000, 17500, 50000)

[Bracket results are recoded in WPUPAYL WPUPAYU WPUPAYE  
WPUPAYR]

END OF FILTER

If frequency of usual take home pay <> one week, two weeks, four weeks,  
calendar month, yearly, one off  
[WPUP <> 1, 2, 4, 5, 52, 95]

**WPUPAOB\***

Would it be.....

BRACKETS (500, 800, 1400, 4000)

[Bracket results are recoded in wpupaol WPUPAOU WPUPAOE  
WPUPAOR]

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**WPPAYA\***

INTERVIEWER: HOW ACCURATE DO YOU THINK THE ANSWERS GIVEN BY THE RESPONDENT TO THE QUESTIONS ABOUT PAY WERE?

- 1 Very Accurate
- 2 Fairly Accurate
- 3 Not Very Accurate
- 4 Not At All Accurate

END OF FILTER

*IF derived activity status = paid work, temporarily away and employment status = self-employed  
[(WPACTW = 1,2) AND (WPES = 2)]*

**WPIR**

[^Do you prepare annual business accounts/in your business are annual business accounts prepared] for the inland revenue for tax purposes?

- 1 Yes
- 2 No
- 3 Not Yet But Will Be

*IF prepare annual business accounts = yes [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 sole account or partnership = 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.

- 1 PRESS <1> AND <ENTER> TO CONTINUE.

END OF FILTER

**WPRAIR**

What is the most recent period for which accounts have been prepared for the inland revenue?

INTERVIEWER: ENTER THE YEAR AT START OF THE PERIOD  
RANGE: 1900..2050

*[CHECK WP23] SIGNAL: IF year at start of most recent period when accounts have been prepared is later than the year of feed forward data*

*IF [wprair > fwyear]*

INTERVIEWER: THIS IS LATER THAN [^YEAR OF FEED FORWARD DATA]!  
PLEASE CHECK!

*[CHECK WP24] SIGNAL: IF year at start of most recent period when accounts have been prepared is before 1995*

*IF [wprair < 1995]*

INTERVIEWER: THAT SEEMS A LONG TIME AGO ([^YEAR MOST RECENT PERIOD ACCOUNTS HAVE BEEN PREPARED]). CAN I CHECK I HAVE RECORDED THAT CORRECTLY?

*[CHECK WP25] CHECK: if date at start of most recent period when accounts have been prepared is later than the date of interview*

*IF [todate (wprair, wpraim.ord, 1) < intdat ]*

INTERVIEWER: THIS DATE IS IN THE FUTURE ([^MONTH MOST RECENT PERIOD ACCOUNTS HAVE BEEN PREPARED ^YEAR MOST RECENT PERIOD ACCOUNTS HAVE BEEN PREPARED])! PLEASE CHANGE!

*If period last accounts prepared = response [WPRAIR = RESPONSE]*

**WPRAIM**

(What is the most recent period for which accounts have been prepared for the inland revenue?)

INTERVIEWER: CODE MONTH AT START OF THE PERIOD. IF DOESN'T KNOW MONTH, CODE SEASON.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start of Year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (End of Year)

END OF FILTER

**WPRAEY**

(What is the most recent period for which accounts have been prepared for the inland revenue?)

INTERVIEWER: ENTER YEAR AT END OF THE PERIOD.

RANGE: 1900..2050

*[CHECK WP26] SIGNAL: if year at end of most recent period when accounts have been prepared is later than year of feed forward data*

*IF [wpraey > fwyear]*

INTERVIEWER: THIS IS LATER THAN [^YEAR OF FEED FORWARD DATA]! PLEASE CHECK!

*[CHECK WP27] SIGNAL: IF year at start of most recent period when accounts have been prepared before 1995*

*iF [wpraey < 1995]*

INTERVIEWER: THAT SEEMS A LONG TIME AGO ([^YEAR OF MOST RECENT PERIOD ACCOUNTS HAVE BEEN PREPARED FOR INLAND REVENUE]). CAN I

CHECK I HAVE RECORDED THAT CORRECTLY?

If period last accounts prepared = response

[WPRAEY = RESPONSE]

**WPRAEM**

(What is the most recent period for which accounts have been prepared for the inland revenue?)

INTERVIEWER: CODE MONTH AT END OF THE PERIOD. IF DOESN'T KNOW MONTH, CODE SEASON.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start Of Year)
- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (End Of Year)

**[CHECK WP28] CHECK:** IF date of most recent period when accounts have been prepared is after the interview date.

IF [(todate (wpraey, wpraem.ord, 1) > intdat ]

INTERVIEWER: THIS DATE IS IN THE FUTURE ([^MONTH OF MOST RECENT PERIOD ACCOUNTS HAVE BEEN PREPARED FOR INLAND REVENUE ^YEAR OF MOST RECENT PERIOD ACCOUNTS HAVE BEEN PREPARED FOR INLAND REVENUE])! PLEASE CHANGE!

**[CHECK WP29] CHECK:** if date at the end of most recent period when accounts have been prepared is before the date of the start of most recent period when accounts have been prepared.

IF [ (todate (wpraey, wpraem.ord, 1) < (todate (wprair, wpraim.ord, 1))

INTERVIEWER: THE START DATE SHOULD BE BEFORE THE END DATE!  
PLEASE CHANGE!

END OF FILTER

**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 WP30] SIGNAL:** IF amount of share of profit or loss on accounts is greater than £120,000CHECK

IF [WPPROF > 120000]

INTERVIEWER: ARE YOU SURE? £[^AMOUNT PF SHARE OF PROFIT OR LOSS ON ACCOUNTS] SEEMS HIGH - PLEASE CHECK.

IF amount of profit or loss = DK, RF [(WPPROF = DK) OR (WPPROF = | | | RF)]

**WPPROFB**

Was it.....

BRACKETS (5000, 10000, 20000, 60000)

*[bracket results are recoded in WPPROFL WPPROFU WPPROFE WPPROFR]*

END OF FILTER

**WPPL**

Does this amount refer to a profit or loss?

- 1 Profit/Earnings
- 2 Loss

*IF amount = profit [WPPL = 1]*

**WPBDT**

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

- 1 YES (BEFORE TAX)
- 2 NO (AFTER TAX)
- 3 (SPONTANEOUS: NOT LIABLE FOR TAX)

**WPBDNI**

And is that figure before deduction of national insurance?

- 1 yes (before NI)
- 2 no (after NI)

END OF FILTER

END OF FILTER

*If prepare annual business accounts = no, not yet [WPIR = 2, 3]*

**WPBI**

Now I'd like to ask some questions about your income from your [<sup>^</sup>work/business], that is after paying for any materials, equipment or goods that you use in [<sup>^</sup>your work/the business]. on average what was your weekly or monthly income from over the last 12 months, before deductions for any tax, national insurance or pension contributions?

INTERVIEWER: CODE WHETHER THE AMOUNT WILL BE GIVEN WEEKLY OR MONTHLY.

- 1 Weekly
- 2 Monthly

*IF INCOME OVER LAST 12 MONTHS = WEEKLY [WPBI = 1]*

**WPBIWA**

INTERVIEWER: ENTER AVERAGE WEEKLY INCOME OVER LAST 12 MONTHS.

RANGE: 0..999997

*[CHECK WP31] SIGNAL: if average weekly income from business is greater than £8,000*

*IF [WPBIWA > 8000]*

INTERVIEWER: ARE YOU SURE? £[<sup>^</sup>AVERAGE WEEKLY INCOME FROM BUSINESS] SEEMS HIGH - PLEASE CHECK.

*IF average weekly INCOME = DK, RF [(WPBIWA = DK) OR (WPBIWA = RF)]*



**WPBIWAB**

Was it.....

BRACKETS (200, 400, 1000, 4000)

*[Bracket results are recoded in WPBIWAL WPBIWAU WPBIWAE WPBIWAR]*

END OF FILTER

END OF FILTER

*IF income over last 12 months = monthly [WPBI = 2]***WPBIMA**

INTERVIEWER: ENTER AVERAGE MONTHLY INCOME OVER LAST 12 MONTHS.

RANGE: 0..999997

*[CHECK WP32] SIGNAL: if average monthly income from business is greater than £30,000**IF [WPBIMA > 30000]*

INTERVIEWER: ARE YOU SURE? £[^AVERAGE MONTHLY INCOME FROM BUSINESS] SEEMS HIGH - PLEASE CHECK.

END OF FILTER

*IF average weekly income = dk, rf or period of income over last 12 months = dk,rf  
[(WPBIMA = DK) OR (WPBIMA = RF)] OR (WPBI = DK) OR (WPBI = RF)]***WPBIMAB**

Was it.....per month

BRACKETS (800, 1500, 4000, 15000)

*[Bracket results are recoded in WPBIMAL WPBIMAU WPBIMAE WPBIMAR]*

END OF FILTER

END OF FILTER

*IF self-employment description = a sole director, running a business, a partner in a business**[(WPCJB = 2) OR (WPCJB = 3) OR (WPCJB = 4)]***WPBUSV**

About how much is [^the business/your share of the business] worth?

RANGE: 0..99999997

*[CHECK WP33] SIGNAL: if amount business is worth is greater than £2,000,000  
IF [WPBUSV > 2,000,000]*

INTERVIEWER: ARE YOU SURE? £[^AMOUNT BUSINESS IS WORTH] SEEMS HIGH – PLEASE CHECK.

*IF VALUE OF BUSINESS = DK, RF [(WPBUSV = DK) OR (WPBUSV = RF)]***WPBUSVB**

IS IT.....

BRACKETS (25000, 100000, 250000, 1000000)

*[Bracket results are recoded in WPBUSVL, WPBUSVU, WPBUSVE, WPBUSVR]*

END OF FILTER

END OF FILTER

END OF FILTER

**WPMOJ**

[^Can I just check, do/do you] currently earn any money from [^work that you might do from time to time/other work that you might do apart from your main job]?

INTERVIEWER: INCLUDE PAID BABYSITTING, MAIL ORDER AGENT, POOLS AGENT, ETC.

- 1 Yes
- 2 No

*IF second job = yes [WPMOJ = YES]*

**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 WP34] SIGNAL: IF hours worked per month in other jobs is greater than 70*

*IF [ WPHMSJ>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?

INTERVIEWER:ENTER AMOUNT.

ROUND TO THE NEAREST £.

RANGE: 0..9999997

*[CHECK WP35] SIGNAL: IF total income from other jobs is greater than £5,000 per month*

*IF [WPESJ> 5000]*

INTERVIEWER: ARE YOU SURE? £[^TOTAL INCOME FROM OTHER JOBS] SEEMS HIGH – PLEASE CHECK.

*IF amount of income after tax = DK, RF [(WPESJ = DK) OR (WPESJ = RF)]*

**WPESJB**

WAS IT.....

BRACKETS (250, 500, 1000, 2500)

*[Bracket results are recoded in WPESIL WPESJU WPESJE WPESJR]*

END OF FILTER

*IF amount of income after tax = 0 [(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 average monthly income after tax = DK, RF*  
*[(WPESJM = DK) OR (WPESJM = RF)]*

**WPESJMB**

WAS IT.....

BRACKETS (250, 500, 1000, 2500)

*[Bracket results are recoded in WPESMIL WPESJMU WPESJME WPESJMR]*

END OF FILTER

END OF FILTER

END OF FILTER

**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 business ownership = yes [WPBUS = 1]*

**WPVBUS**

About how much is your share of the business worth?

RANGE: 0..99999997

*IF value of business = DK, RF [(WPVBUS = DK) OR (WPVBUS = RF)]*

**WPVSBUSB**

IS IT.....

BRACKETS (25000, 100000, 250000, 1000000)

*[Bracket results are recoded IN WPVBUSL WPVBUSU WPVBUSE WPVBUSR]*

END OF FILTER

END OF FILTER

*IF Wpactw=1,2,3 AND (AbvSPA[perno] = 1*

**WPOWK\***

What are [*^your/^name*]'s reasons for working after state pension age?

INTERVIEWER: CODE ALL THAT APPLY

- 1 Could not afford to retire earlier
- 2 Didn't know what to do after stopping work
- 3 Enjoyed job/working
- 4 To improve pension/financial position
- 5 To keep fit and active
- 6 To retire at the same time as husband/wife/partner
- 7 Persuaded by employer to stay on

Description	Variable	Archive
Could not afford to retire earlier	WPOWK1	WPOWKAF
Didn't know what to do after stopping work	WPOWK2	WPOWKDO
Enjoyed job/working	WPOWK3	WPOWKEW
To improve pension/financial position	WPOWK4	WPOWKIF

To keep fit and active	WPOWK5	WPOWKKE
To retire at the same time as husband/wife/partner	WPOWK6	WPOWKST
Persuaded by employer to stay on	WPOWK7	WPOWKEP

*IF number of pensions at last interview = 0 or there is no feed-forward data for number of pensions at last interview (NA, DK, REF, New Partner)  
 [(FF\_inp[number of pensions fed-forward] = 0) OR (FF\_inp[number of pensions fed-forward= 9991, 9998, 9999 or EMPTY])]*

*IF EMPLOYMENT STATUS = EMPLOYEE [WPES = 1] AND WPACT=1,2*

**WPBPS**

Does your current employer offer a pension scheme which you are entitled to join?

- 1 Yes
- 2 No

*IF current employer pension scheme = yes [WPBPS = 1]*

**WPPS**

Are you a member of this pension scheme?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF current employer pension scheme <> yes or current employer pension scheme membership <> yes  
 [(WPBPS <> YES) OR (WPPS <> YES)]*

**WPMORE**

Apart from state pensions, do you have any pension schemes that you belong to now, or you had in the past? Please include schemes which you are currently receiving an income from and include any to which a former spouse/partner contributed.

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

**WPNPENS**

Computed: Number of private pensions mentioned  
 Range 0..8

**WPRPENS**

Computed: Number of non-receiving pensions (with retained rights but no income currently received)  
 Range 0..8

## 5.1. Private Pensions

START OF PENSIONS LOOP

Loop for each pension mentioned in previous interview and any additional pensions indicated at WPMORE WPMOREPC WPPS WPPSPC

### PPREVNEW

Computed: Whether pension is previously reported ("Prev") or new ("New")  
STRING

*IF pension indicator = mentioned at previous interview*

*[PPREVNEW = PREV]*

### WPPREV

Last time you were interviewed, in [*^date of last interview*], you told us about [*^an employer pension/a private personal pension/a group personal pension/a stakeholder pension/a retirement annuity pension/an s226 plan/another retirement saving scheme*] called [*^pension name*] [*^which you had stopped contributing to/which you were receiving an income from*].

INTERVIEWER: CODE 1 BELOW UNLESS RESPONDENT SPONTANEOUSLY DISPUTES THIS RECORD. IF THE PENSION SCHEME IS THE SAME AS LAST TIME BUT THE NAME HAS CHANGED, CODE 1 AND CHANGE THE NAME AT THE NEXT QUESTION.

- 1 yes
- 2 no
- 3 not read out as didn't make sense

END OF FILTER

*IF pension not mentioned at last interview and not pension mentioned at wpps or wppspc [(WpPrev = Yes) OR (PPrevNew = 'New')]*

### WPPENT

What type of pension is this?

- 1 Employer pension
- 2 Private personal pension
- 3 Group personal pension
- 4 Stakeholder pension
- 5 S226 plan
- 6 Retirement annuity pensions (pre 86 ppps)
- 7 Self-invested personal pension (sipp)
- 8 National employee savings trust (nest)
- 95 Other retirement saving scheme

*PROGRAMMING NOTE: if feed-forward FF\_WpPenT = RESPONSE, compute WPPENT = feed-forward FF\_WpPenT. If in employers' scheme, compute WPPENT*

*= 1.*

END OF FILTER

### WPNEWP

Computed: Whether this is a new pension

1. Yes
2. No

*PROGRAMMING NOTE: Computation logic:*

*IF (PPrevNew = 'Prev') THEN WpNewP:= No*

*IF (PPrevNew = 'New') THEN WpNewP:= Yes*

*IF (pension(s) mentioned at last interview = yes or pension indicator = new)*

[(WPPREV = 1) OR (PPREVNEW = 'NEW')]

if (pension(s) mentioned at last interview = yes and name of pension mentioned at last interview = response)

[ IF (WpPrev = Yes) AND (FF\_WpName = RESPONSE)]

**WPNAMEC**

Can I just check has this [^employer pension/ private personal pension/group personal pension/stakeholder pension/an s226 plan/retirement annuity pension (pre 86 ppps)/ self-invested personal pension (sipp)/national employment savings trust (or nest) account/retirement saving scheme/pension] [^which you had stopped contributing to / which you were receiving an income from] changed its name  
INTERVIEWER: ONLY CODE YES IF THE PENSION REALLY IS THE SAME SCHEME, AS OPPOSED TO BEING A DIFFERENT SCHEME.

01 Yes

02 No

END OF FILTER

IF name of pension mentioned at last interview AND

name of pension changed = no

[IF FF\_WpName = RESPONSE) AND (WpNameC | = No)]

**WPNAME**

[^Can i just check], what is the name of this pension scheme?

STRING: 80

END OF FILTER

END OF FILTER

IF current or past pension = current or current or past pension <> response or pension indicator = new

[(WPFFCURP (LAST INT) = 1) OR (WPFFCURP (LAST INT) <> RESPONSE) OR (PPREVNEW = 'NEW')]

IF (number of current pensions >1 and pension scheme membership = yes) or (number of current pensions = 1 number of pensions fed forward = 0 and membership of pension scheme = yes)

[[(INP > 1) AND (WPPSPC = 1)) OR ((INP = 1) AND (FF\_iNP) AND (WPPS = 1))]

**WPCURR**

[^Do you currently contribute to this pension/do you or your employer currently contribute to this pension/are you currently contributing or could you still contribute to this pension]?

1 Yes

2 No

END OF FILTER

IF currently contributing = no and pension indicator = pension mentioned at last interview

[(WPCURR = 2) AND (PPREVNEW = 'PREV')]

**WPLFTPS**

Why are you no longer a member of this pension scheme?

INTERVIEWER: CODE ALL THAT APPLY.

- 01 I changed employer
- 02 Employer no longer offers pension scheme
- 03 No longer eligible to be a member of pension scheme
- 04 Left as could not afford payments
- 05 Retired
- 06 Started receiving pension
- 95 Other reason

**[Code maximum 7 out of 7 possible responses]**

DESCRIPTION	VARIABLE	ARCHIVE
I changed employer	WPLFTPS1	WPLFTPCH
Employer no longer offers pension scheme	WPLFTPS2	WPLFTPPOF
No longer eligible to be a member of pension scheme	WPLFTPS3	WPLFTPPEL
Left as could not afford payments	WPLFTPS4	WPLFTPAPF
Retired	WPLFTPS5	WPLFTPRT
Started receiving pension	WPLFTPS6	WPLFTPPE
Other reason	WPLFTPS9	WPLFTP95

END OF FILTER

END OF FILTER

```
IF (WpCurr = No) THEN WpCurP := Past
ELSEIF (WpCurr = Yes) THEN WpCurP := Current
ELSEIF (WpRec = RESPONSE) THEN WpCurP := Past
ELSE WpCurP := DK
ENDIF
```

### WPCURP

Computed: Whether a past or current pension schedule

- 1 Past
- 2 Current

*IF ((pension indicator = pension mentioned at previous interview) and (pension type = employer pension)) and (past or current pension = current)*  
*[[((PREVNEW = 'PREV') AND (WPFPPENT = 1)) AND (WPCURP = 2)]*

### WPSRUL

Have any of the pension scheme rules changed since we last interviewed you?

- 1 Yes
- 2 No
- 3 After capi prompt: yes, scheme rules have changed

END OF FILTER

*IF ((pension type = employer pension) or (pension type = dk, rf) and (currently contributing to pension = yes) and (pension indicator = new)) or ((defined benefit or defined contribution at last interview not in feed-forward data (NA, DK, REF, New partner) and (past or current pension = current) and (pension type = employer pension or pension type = dk, rf))) or (pension scheme rules = yes, yes prompted)*  
*[IF (((WpPenT = EmpIPS) OR (WpPenT = DK) OR (WpPenT = RF)) AND (WpCurr = Yes) AND (PrevNew = 'New')) OR ((FF\_WpDCDB = 9991, 9998, 9999, EMPTY) AND (WPCurP = Current) AND ((WpPenT = EmpIPS) OR (WpPenT = DK) OR (WpPenT =*

RF))) OR (WpsRul IN [Yes, YesP]))

### **WPDPS**

#### **SHOWCARD E7**

Is your pension scheme more like type a or type b?

INTERVIEWER: TYPE 1 IS SOMETIMES CALLED DEFINED CONTRIBUTION OR MONEY PURCHASE, TYPE B IS SOMETIMES CALLED DEFINED BENEFIT.

IF RESPONDENT SAYS NEST (NATIONAL EMPLOYEE SAVINGS TRUST), CODE AS (1) TYPE A.

- 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

END OF FILTER

*IF((pension indicator = new pension) and (pension type = employer pension) and (past or current = current)) or (pension scheme rules = yes, yes prompted) or ((past or current = current) and (pension type = 1) and (no feed-forward data for defined benefit or defined contribution (NA, DK, REF, New partner))*

*[IF ((PrevNew = 'New') AND (WpPenT = EmplPS) AND (WpCurp = Current) AND (WPDPS=2)) OR (WpSRul IN [Yes, YesP] AND (WPDPS=2)) OR ((WpCurp = Current) AND (WpPenT = EmplPS) AND (FF\_WpDCDB <> 9991, 9998, 9999, Empty) AND (WPDPS=2))]*

### **WPNRA**

Is there a normal retirement age in your pension scheme or period of service after which 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 normal retirement age = yes – normal retirement age, yes-both*  
*[WPNRA = 1,3]*

### **WPBTHA**

What is the normal retirement age?

RANGE: 0..120

END OF FILTER

*IF normal retirement age = yes – period of service, yes- both*  
*[WPNRA = 2,3]*

### **WPBTHP**

What is the period of service?

RANGE: 0..120

END OF FILTER

*IF normal retirement age = yes – normal retirement age, yes- both*  
*[WPNRA = 1,3]*



**WPERA**

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

- 1 Yes
- 2 No
- 3 Occasionally

END OF FILTER

*IF early retirement option = yes, occasionally or normal retirement age = period of service, NO, DK*

*[(WPERA = 1, 3) OR (WPNRA = 2, 4, 5)]*

**WPYAER**

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

RANGE: 0..120

END OF FILTER

*IF defined benefit or defined contribution = defined benefit*

*[WPDCDB = 1]*

**WPDESP**

SHOWCARD E8

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

INTERVIEWER: 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 calculation = some other way*

*[WPDESP = 4]*

**WPODP**

INTERVIEWER: WRITE IN OTHER WAY.

STRING: 70

END OF FILTER

*IF pension calculation <> DK*

*[WPDESP <> 5]*

**WPFSAP**

What fraction will be added to your final pension for each year's service?

- 1 1/60
- 2 1/80
- 3 OTHER
- 4 DON'T KNOW

*IF pension fraction = other*

*[WPFSAP = 3]*

**WPFSAL**

INTERVIEWER: ENTER OTHER FRACTION.

STRING: 10

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF ((pension indicator = new or pension scheme rules = yes, yes prompted or (no feed-forward data for defined benefit or defined contribution(NA, DK, REF, New partner)) and defined benefit or defined contribution = defined benefit)  
[IF ((PrevNew = 'New') OR (WpSRul IN [Yes, YesP]) OR (FF\_WpDCDB =9991, 9998, 9999, empty) AND (WpDcDb = db)]*

**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

*IF PENSION RISE = YES*

*[WPPLP = 1]*

**WPPLPH**

Will this be...

INTERVIEWER: READ OUT

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

END OF FILTER

END OF FILTER

*IF defined benefit or defined contribution = defined benefit*

*[WPDCDB = 1]*

**WPLUMP**

What size lump sum do you expect to receive when you retire?

RANGE: 0..9999997

*IF lump sum amount = DK, RF*

*[(WPLUMP = DK) OR (WPLUMP = RF)]*

**WPLUMPB**

Would it be.....

BRACKETS (5000, 15000, 50000, 200000)

*[Bracket results are recoded IN WPLUMPL WPLUMPU WPLUMPE WPLUMPR]*

END OF FILTER

**WPPTP**

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

INTERVIEWER: IF ASKED: IN TODAY'S PRICES.  
INTERVIEWER: CODE HOW ANSWER IS GIVEN.

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

*If income from pension =percentage of salary*  
[WPPTP = 1]

**WPPSAL**

INTERVIEWER: ENTER PERCENTAGE OF SALARY.  
RANGE: 1..100

END OF FILTER

*If income from pension = annual amount of money*  
[WPPTP = 2]

**WPASAL**

INTERVIEWER: ENTER AMOUNT PER YEAR.  
RANGE: 0..999997

END OF FILTER

*IF annual amount = nonresponse or income from pension = nonresponse*  
[WPASAL = NONRESPONSE OR WPPTP = NONRESPONSE]

**WPASALB**

Would it be.....

BRACKETS (2500, 5000, 12500, 50000)

*[Bracket results are recoded in WPASALL WPASALU WPASALE  
WPASALR]*

END OF FILTER

END OF FILTER

*IF (pension scheme rules = yes, yes prompted) or ((pension indicator = new pension  
and past or current = current)) or (past or current = current)*  
[(WPSRUL = 1,3) OR ((PREVNEW = 2 AND WPCURP = 2) OR (WPCURP = 2))]

**WPYBS**

How many years have you had this pension?

RANGE: 0..60

END OF FILTER

*IF pension type = employer pension and past or current pension = current and  
employment status = employee and derived activity status = paid work, temporarily  
away from paid work, waiting to start paid work already accepted)*  
[(WPPENT = 1) AND (WPCURP = 2) AND (WPES = EMPLOYEE) AND (WPACTW  
=1,2,3)]

**WPERC**

Does your employer require you to make a contribution to your pension scheme?

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

*IF defined benefit or defined contribution = defined benefit and compulsory contribution = yes*

*[WPDCDB = 2 AND WPERC = 1]*

**WPMC**

What is the minimum contribution you need to make?

INTERVIEWER: CODE HOW ANSWER IS GIVEN.

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

*IF minimum contribution = amount*

*[WPMC = 1]*

**WPMCA**

INTERVIEWER: ENTER AMOUNT.

RANGE: 0..9997

**WPPERC**

What period does this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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)

END OF FILTER

*IF minimum contribution = percentage of salary*

*[WPMC = 2]*

**WPMFRAC**

INTERVIEWER: ENTER PERCENTAGE OF SALARY.

RANGE: 0..100

END OF FILTER

**WPACON**

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

INTERVIEWER: READ OUT

- 1 ... Additional voluntary contributions - AVCS,
- 2 Buying added years,
- 3 Or irregular contributions?
- 4 No
- 5 Don't know

*IF type of additional contributions = buying added years*

*[WPACON = 2]*

**WPADY**

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

RANGE: 0..10

END OF FILTER

*IF type of additional contributions = AVCS*

*[WPACON = 1]*

**WPACOA**

How much [*do you usually contribute through AVCS/are your usual additional contributions*]?

INTERVIEWER: CODE HOW ANSWER IS GIVEN.

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

*IF additional contribution = amount*

*[WPACOA = 1]*

**WPACOB**

INTERVIEWER: ENTER AMOUNT.

RANGE: 0..99997

**WPACOC**

What period does this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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)

END OF FILTER

*IF additional contribution = percentage of salary*

*[WPACOA = 2]*

**WPFRAS**

INTERVIEWER: ENTER PERCENTAGE OF SALARY.

RANGE: 0..100

END OF FILTER

END OF FILTER

*IF type of additional contributions = irregular contributions*

*[WPACON = 3]*

**WPCONY**

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

INTERVIEWER: ENTER AMOUNT.

RANGE: 0..99997

END OF FILTER

END OF FILTER

END OF FILTER

*IF wperc = no, dk, nonresponse or (wppent = private personal pension, group personal pension, stakeholder pension, s226 plan, retirement annuity pensions (pre 86 ppps), other retirement saving scheme) and (past or current pension =current) or ((pension type = employer pension and past or current pension = current and wpes<> employee)) or ((pension type = employer pension and past or current pension = current and wpes= employee and derived activity status <> paid work, temporarily away from paid work, waiting to start work already accepted))*

*[(WPERC = 2, 3, NONRESPONSE) OR ((WPPENT = 2, 3, 4, 5, 6, 95) AND (WPCURP = CURRENT)) OR ((WPPENT = 1) AND (WPCURP = 2) AND (WPES <> 1)) OR ((WPPENT = 1) AND (WPCURP = 2) AND (WPES = EMPLOYEE) AND (WPACTW <> 1,2,3)) OR (WPPENT = 1 AND (WPCURP = 2) AND (WPES = EMPLOYEE) AND (WPACTW =1,2,3) AND WPDCDB = 1)]*

**WPPCONT** [NAMED **WPPCON** IN DATA]

Do you contribute to your pension ...

INTERVIEWER READ OUT

- 1 ... Never,
- 2 Regularly,
- 3 Irregularly,
- 4 Or, have you stopped contributing to your scheme?

*IF contribution regularity = regularly*

*[WPPCONT = 2]*

**WPYCAMT** [NAMED **WPYCAT** IN DATA]

How much do you currently contribute to your pension scheme?

INTERVIEWER: CODE HOW ANSWER IS GIVEN.

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

*IF type of contribution = amount*

*[WPYCAMT = 1]*

**WPYCA**

INTERVIEWER: ENTER AMOUNT.

RANGE: 0..99997

**WPMCAF**

What period does this cover?

- 01 One week

- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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)

END OF FILTER

*IF type of contribution = percentage of salary*  
 [WPYCAMT = 2]

**WPYFRAC** [NAMED WPYFRA IN DATA]  
 INTERVIEWER: ENTER PERCENTAGE OF SALARY.  
 RANGE: 0..100

END OF FILTER

END OF FILTER

*IF contribution regularity = irregularly, stopped contributing*  
 [WPPCONT = 3, 4]

**WPLCOY**

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

*IF year last contributed to pension = response and year last contributed >= year of last interview*  
 [(WPLCOY = RESPONSE) AND (WPLCOY >= YEAR OF LAST INTERVIEW)]

**WPLCOM**

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

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December
- 13 Winter (Start Of Year)

- 14 Spring
- 15 Summer
- 16 Autumn
- 17 Winter (End Of Year)

END OF FILTER

*IF year last contributed to pension within last 12months*

*[(WplcoY >= (YEAR(SYSDATE) - 1))]*

**WPNIRR**

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

RANGE: 0..60

END OF FILTER

**WPMCON**

About how much did you contribute [*on that occasion/in the last 12 months*]?

INTERVIEWER: CODE HOW ANSWER IS GIVEN.

- 1 Amount
- 2 Percentage of Salary
- 3 Don't Know

*IF type of contribution = amount*

*[WPMCON = 1]*

**WPAC**

INTERVIEWER: ENTER AMOUNT.

RANGE: 0..99997

END OF FILTER

*IF type of contribution = percentage of salary*

*[WPMCON = 2]*

**WPFSC**

INTERVIEWER: ENTER PERCENTAGE OF SALARY.

RANGE: 0..100

END OF FILTER

END OF FILTER

END OF FILTER

*IF pension type <> s226p and wpes = employee and past or current pension = current and derived activity status = paid work, temporarily away from paid work, waiting to start paid work*

*[(WPPENT <>5) AND (WPES = 1) AND (WPCURP = 2) AND (WPACTW =1,2,3)]*

**WPCEMP**

Does your employer contribute to this pension?

- 1 Yes - Regularly
- 2 Yes - Irregularly
- 3 No

*IF whether employer contributes to pension = yes, 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 type of contribution = amount*

[WPECPP = 1]

**WPAECP**

INTERVIEWER: ENTER AMOUNT.  
RANGE: 0..99997

*IF contribution amount = response*

[WPAECP = RESPONSE]

**WPEPERI** [NAMED WPEPER IN THE DATA]

What period does that cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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)

END OF FILTER

END OF FILTER

*IF type of contribution = percentage of salary*

[WPECPP = 2]

**WPFSEC**

INTERVIEWER: ENTER PERCENTAGE OF SALARY.  
RANGE: 0..100

END OF FILTER

END OF FILTER

*IF whether employer contributes to pension = yes, regularly*

[WPCEMP = 1]

**WPMEC**

How much does your employer usually contribute?

- 1 Amount

- 2 Percentage of salary
- 3 Percentage of contribution
- 4 Don't know

*IF type of contribution = amount*

*[WPMEC = 1]*

**WPAMEC**

INTERVIEWER: ENTER AMOUNT.  
RANGE: 0..99997

*IF contribution amount = response*

*[WPAMEC = RESPONSE]*

**WPFSCP**

What period does that cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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)

END OF FILTER

END OF FILTER

*IF contribution type = percentage of salary, percentage of contribution*

*[WPMEC = 2, 3]*

**WPFSCO**

INTERVIEWER: ENTER PERCENTAGE OF SALARY OR CONTRIBUTION.  
RANGE: 0..100

END OF FILTER

END OF FILTER

END OF FILTER

*IF defined benefit or defined contribution = defined benefit and past or current pension*

*= current*

*[(WPDCDB =2) AND (WPCURP = 2)]*

**WPFSAV**

Do you make any free standing additional voluntary contributions (FSAVC'S)?

- 1 Yes
- 2 No

IF FSAVC = YES [WPFSAV = 1]

**WPPFVAL** [NAMED **WPPFVA** IN THE DATA]

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

RANGE: 0..9999997

IF value of accumulated contributions = DK, RF

[WPPFVAL = DK OR WPPFVAL = RF]

**WPPFVALB**

Would it amount to.....

BRACKETS (2500, 7500, 25000, 100000)

**[Bracket results are recoded in WPPFVL WPPFVU WPPFVE WPPFVR]**

END OF FILTER

END OF FILTER

END OF FILTER

IF (pension type = employer pension, dk, rf) and (prevnew = new and past or current pension = past) or (past or current pension = past and (no feed-forward data for defined benefit or defined contribution (NA, DK, REF, New Partner))

[IF (WpPenT = EmplPS OR WpPenT = NONRESPONSE) AND ((PrevNew = 'New' AND QPenA.WpCurP = Past) OR (QPenA.WpCurP = Past AND FF\_WpDCDB = NA, DK, REF, Empty))]

**WPDSP**

SHOWCARD E9

Is your pension scheme more like type A or type B?

INTERVIEWER: TYPE A IS SOMETIMES CALLED DEFINED CONTRIBUTION OR MONEY PURCHASE, TYPE B IS SOMETIMES CALLED DEFINED BENEFIT.

IF RESPONDENT SAYS NEST (NATIONAL EMPLOYEE SAVINGS TRUST), CODE AS (1) TYPE A.

1 Type A: my pension contributions were put into a fund which grew over time and the pension depended, or will depend, on the size of this accumulated fund

2 Type B: my pension is based on a formula involving age, years of service and salary

3 Don't know

END OF FILTER

IF (currently contributing <> yes) OR

(current or past pension at last interview = response AND current or past pension at last interview <> current AND

NOT ( (current pension iteration > 1 and scheme membership for previous pension iteration = yes)

OR (current pension iteration = 1 AND number of pensions fed forward = 0 AND membership of pension scheme = yes) ) )

[IF (WPCURR <> YES AND (WPDSP=2 OR FF\_WPCURP=2 OR

AGEP[PNUM]>=55)) OR ((FF\_WPCURP=RESPONSE AND FF\_WPCURP <>

CURRENT AND NOT((INP > 1 AND QPENSION[INP- 1].WPPSPC = 1) OR (INP = 1 AND FF\_INP = 0 AND WPPS = 1))]

**WPREC**

Are you [<sup>^</sup>still] receiving a pension or regular income from this scheme?  
INTERVIEWER: THIS MAY BE FROM A FORMAL PRODUCT SUCH AS A DEFINED BENEFIT PENSION, AN ANNUITY OR A DRAWDOWN ARRANGEMENT, OR RESPONDENTS MAY BE PROVIDING THEMSELVES WITH A REGULAR INCOME - FOR EXAMPLE, BY WITHDRAWING A SIMILAR AMOUNT OF MONEY EACH MONTH FROM AN ACCUMULATED PENSION FUND.

- 1 Yes
- 2 No

*[CHECK WP36] SIGNAL: IF receiving a pension or regular income from the scheme and respondent less than 55 years old*

*IF [WPREC = 1 AND AGEF <55]*

INTERVIEWER: "CHANGES TO THE LAW NOW MEAN THAT PENSION SCHEMES CANNOT PAY PENSIONS TO MEMBERS BEFORE AGE 55 EXCEPT IN SOME SPECIAL CIRCUMSTANCES. PLEASE CHECK."

*IF (current pension receipt = no and currently contributing <> yes) or (currently contributing <> yes and (defined benefit or defined contribution = contribution or aged over 55)*  
*[(WPCURR<>YES AND WPREC=NO) OR (WPCURR<>YES AND (WPDSP=1 OR FF\_WPCDB=1) AND AGEF[PNUM]<55)]*

#### **WPRGHX**

Have you...

INTERVIEWER: READ OUT

INTERVIEWER: GETTING A 'SHORT-SERVICE REFUND OF CONTRIBUTIONS' SHOULD BE CODED AS 4, USING 'TRIVIAL COMMUTATION' SHOULD BE CODED AS 4, AND 'SELLING AN ANNUITY' SHOULD BE CODED AS 5."

- 1 Retained pension rights in this scheme,
- 2 Transferred rights from this scheme into another scheme,
- 3 Transferred rights from this scheme to your former spouse/partner at the time of your divorce / partnership dissolution
- 4 Received a lump sum refund of contributions?
- 5 Or exchanged your pension income for a lump sum?
- 6 [spontaneous: has stopped receiving pension from this scheme]

END OF FILTER

*IF retained pension rights and defined benefit or defined contribution=[defined benefit]*  
*[WPRGHX = 1 AND (WPCDB = DB OR FF\_WPCDB=2)]*

#### **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 amount expected from pension = total amount, annual amount*  
*[(WPPAM =1,2)]*

#### **WPPA**

INTERVIEWER: ENTER AMOUNT.

RANGE : 0..9999997

END OF FILTER

*IF amount expected from pension = total amount and amount given<>response*  
[(WPPAM = TOTAL) AND (WPPA <> RESPONSE)]

**WPTB**

Would it be.....

BRACKETS (5000, 15000, 50000, 100000)

[Bracket results are recoded in wppatl WPPATU WPPATE WPPATR]

END OF FILTER

*IF ((amount expected from pension = dk, rf) or ((amount expected from pension = annual)) and (amount given = <> response))*

[(WPPAM = DK) OR (WPPAM = RF)] OR ((WPPAM = ANNUAL) AND (WPPA <>RESPONSE))]

**WPAB**

Would it be.....

BRACKETS (2500, 5000, 12500, 50000)

[Bracket results are recoded in WPPAAL WPPAAU WPPAAE WPPAAR]

END OF FILTER

*IF [WPRGHX = 4 OR WPRGHX = 5]*

**WPIRLS**

What was the size of the lump sum you received?

RANGE: 0..9999997

*IF amount of lump sum received = DK, RF*

[WPIRLS = DK OR WPIRLS = RF]

**WPIRLSB**

Was it ...

BRACKETS (2500, 7500, 25000, 100000)

[Bracket results are recorded in WPIRLL WPIRLU WPIRLE WPIRLR]

END OF FILTER

**WPIRP**

What did you do with the lump sum you received?

INTERVIEWER: READ OUT AND CODE ALL THAT APPLY.

1. Purchased an annuity or regular income stream
2. Saved it, for example in a cash ISA or bank or building society account
3. Invested it, for example in an investment ISA, shares or unit trusts
4. Bought land or property
5. Paid off debts (including mortgage debt)
6. Spent it
7. Gave or lent it to a family member or friend
8. Other

Description (Merged Variables)	Archive
Moved Job And Joined Employer's Pension Scheme	WPRCMMO
Rejoined Employer's Pension Scheme In Existing Job	WPRCMRE
Rejoined State Earnings Related Pension Scheme	WPRCMST
Worried About Risks	WPRCMRI

Worried About Publicity Concerning Personal Pensions	WPRCMPU
Because Of Own Illness/Disability	WPRCMOH
Stopped Work/Unemployed	WPRCMUN
Could Not Afford It	WPRCMAF
Changed Jobs And Not Known Whether Joined New Scheme	WPRCMNK
Other Response (Not Codeable 1-9)	WPRC85
Irrelevant Response	WPRC86

END OF FILTER

END OF FILTER

END OF FILTER

*IF currently contributing = yes and((pension type = employer pension and defined benefit or defined contribution = defined contribution) or (pension type = private personal pension, group personal pension, stakeholder pension, s226 plan, retirement annuity pensions (pre 86 ppps), other retirement saving scheme and past or current pension = current)*

*IF (WpCurr = Yes) AND (((WpPenT = EmplPS) AND (QPenA.WpDCDb = DC)) OR ((WpPenT IN [PPP..Other]) AND (QPenA.WpCurP = Current)))*

**WPAPF**

What is the current value of this pension fund?

RANGE: 0..9999997

*IF value of accumulated pension fund = DK, RF [(WPAPF = DK) OR (WPAPF = RF)]*

**WPAPFB**

Is it.....

BRACKETS (2500, 7500, 25000, 100000)

**[Bracket results are recoded in WPAPFL WPAPFU WPAPFE WPAPFR]**

END OF FILTER

**WPPTOP**

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

INTERVIEWER: IF ASKED: IN TODAY'S PRICES.

CODE HOW ANSWER IS GIVEN.

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

*IF pension value = total amount, annual amount*

*[WPPTOP = 1, 2]*

**WPPENB**

INTERVIEWER: ENTER AMOUNT.

RANGE: 0..9999997

END OF FILTER

END OF FILTER

#### WPCONS WPEADD – Removed at wave 4

*IF pension indicator = new and current pension receipt = no*

*[PREVNEW = 1 AND WPCURR<>1 AND WPREC = 2]*

##### **WPDS**

Between what dates (approximately) did you belong to this scheme?

INTERVIEWER: ENTER YEAR STARTED.

RANGE: 1900..2050

##### **WPDE**

(Between what dates (approximately) did you belong to this scheme?)

INTERVIEWER: ENTER YEAR STOPPED.

RANGE: 1900..2050

END OF FILTER

*IF current pension receipt = yes*

*[WPREC = 1]*

*IF defined benefit or defined contribution = defined contribution*

*[(QPenA.WpDCDB = DC OR QpenB.WpDPsP = DC OR WpPenT <> EmplPS OR  
FF\_WpDCDB = DC) AND (FF\_WPANN <> Annuity) AND  
(FF\_WPANN <> DK)]*

##### **WPINCT**

[**Can i just check**] is this income from...

INTERVIEWER: READ OUT

INTERVIEWER: PURCHASING AN ANNUITY FROM A DIFFERENT PROVIDER (CODE 3) IS SOMETIMES REFERRED TO AS BUYING ON THE OPEN MARKET. THE FOLLOWING SHOULD BE CODED AS 4: 'UNSECURED PENSION', 'ALTERNATIVELY SECURED PENSION', 'CAPPED DRAWDOWN', 'FLEXI-ACCESS DRAWDOWN'."

1. An annuity purchased from the pension company who originally provided the scheme
2. An annuity purchased from a company recommended by your original pension provider
3. An annuity purchased from a different provider
4. An income drawdown arrangement
5. Other

END OF FILTER

##### **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?

- 01 One week
- 02 Two weeks

- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 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 OF LAST PAYMENT = RESPONSE [WPPAY = RESPONSE]*

**WPPYR**

How much did you receive?

RANGE: 0..999997

*IF amount received <> response*

*[WPPYR <> RESPONSE]*

*IF period of last payment = one week*

*[WPPAY = 1]*

**WPWB**

Was it.....

BRACKETS (25, 75, 150, 600)

***[Bracket results are recoded in WPPYRWL WPPYRWU WPPYRWE  
WPPYRWR]***

END OF FILTER

*IF period of last payment = two weeks*

*[WPPAY = 2]*

**WPFB**

WAS IT.....

BRACKETS (50, 150, 300, 1200)

***[Bracket results are recoded in WPPYRFL WPPYRFU WPPYRFE WPPYFR]***

END OF FILTER

*IF period of last payment = four weeks, calendar month*

*[WPPAY = 4, 5]*

**WPMB**

Was it.....

BRACKETS (100, 300, 600, 2500)

***[Bracket results are recoded IN WPPYRML WPPYRMU WPPYRME  
WPPYRMR]***

END OF FILTER

*IF period of last payment =yearly, one off*

*[WPPAY = 52, 95]*



**WPYB**

Was it.....

BRACKETS (1500, 4000, 8000, 30000)

**[Bracket results are recoded in WPPYRYL WPPYRYU WPPYRYE  
WPPYRYR]**

END OF FILTER

*IF period of last payment <> one week, two weeks, four weeks, calendar month,  
yearly, one off*

*[WPPAY <> 1, 2, 4, 5, 52, 95]*

**WPOB**

Was it.....

BRACKETS (100, 300, 600, 2500)

**[Bracket results are recoded in WPPYROL WPPYROU WPPYROE  
WPPYROR]**

END OF FILTER

END OF FILTER

END OF FILTER

**WPTAX**

Is this before or after tax?

1 Before tax

2 After tax

3 (Spontaneous: not liable for tax)

*IF WPES = employee and pension type = employer pension and derived activity  
status = paid work, temporarily away from paid work and waiting to take up work  
already accepted)*

*[WPES = 1 AND WPPENT =1 AND WPACTW = 1,2,3]*

**WPNEW1**

Is this pension that you are currently receiving paid for you by your current  
employer?

1 Yes

2 No

3 Don't Know

END OF FILTER

END OF FILTER

*IF (defined benefit or defined contribution = defined contribution or last wave defined  
benefit) and ((currently contributing = yes) or (currently contributing = no and  
pension receipt = yes and **pension receipt at last interview <>receiving**) or (retained  
rights = yes))*

*[(QPENA.WPDCDB = DC OR QPENB.WPDSP = DC OR WPPENT <> EMPLPS  
OR FF\_WPDCDB=1) AND ((QPENA.WPCURP = CURRENT)  
OR (QPENA.WPCURP<>CURRENT AND QPENB.WPREC = YES AND  
**FF\_WPRECP RECEIVING**) OR (QPENA.WPCURP<>CURRENT AND  
QPENB.WPRGHX =  
**RETPERIG**)]*

**WPDCW**

[^Over the past two years/since your last interview], [^in addition to the regular income you just told me about] have you... READ OUT

1. Withdrawn a single lump sum from this scheme
2. Withdrawn multiple cash sums from this scheme
3. Not withdrawn any sums from this scheme

**[CHECK WP37] SIGNAL:** IF has withdrawn a single/multiple cash sum(s) and aged under 55

[(WPDCW = 1 OR WPDCW = 2) and AGEP <55]

INTERVIEWER: "CHANGES TO THE LAW NOW MEAN THAT INDIVIDUALS CANNOT ACCESS THEIR PENSION SAVINGS BEFORE AGE 55 EXCEPT IN SOME SPECIAL CIRCUMSTANCES. PLEASE CHECK."

IF has withdrawn a single/multiple cash sum(s)

[WPDCW = 1,2]

**WPDCWA**

[^In total] how much did you withdraw?

RANGE: 1..999997

IF withdrawal amount = DK, RF

[WPDCWA = DK,RF]

**WPDCWAB**

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

**[Bracket results are recorded in WPLUAL WPLUAU WPLUAE WPLUAR]**

END OF FILTER

**WPDCWP**

What did you do with this money?

INTERVIEWER: READ OUT AND CODE ALL THAT APPLY

1. Saved it, for example in a cash isa or bank or building society account
2. Invested it, for example in an investment isa, shares or unit trusts
3. Bought land or property
4. Paid off debts (including mortgage debt)
5. Spent it
6. Gave or lent it to a family member or friend
7. Other

Description	Variable	Archive
WHAT DID WITH THE MONEY WITHDRAWN: SAVED IT, FOR EXAMPLE IN A CASH ISA OR BANK OR BUILDING SOCIETY ACCOUNT	WPDCWP1	WPDCWPSV
WHAT DID WITH THE MONEY WITHDRAWN: INVESTED IT, FOR EXAMPLE IN AN INVESTMENT ISA, SHARES OR UNIT TRUSTS	WPDCWP2	WPDCWPIN
WHAT DID WITH THE MONEY WITHDRAWN: BOUGHT LAND OR PROPERTY	WPDCWP3	WPDCWPLA
WHAT DID WITH THE MONEY WITHDRAWN: PAID OFF DEBTS (INCLUDING MORTGAGE DEBT)	WPDCWP4	WPDCWPDB
WHAT DID WITH THE MONEY WITHDRAWN: SPENT IT	WPDCWP5	WPDCWPSP

WHAT DID WITH THE MONEY WITHDRAWN: GAVE OR LENT IT TO A FAMILY MEMBER OR FRIEND	WPDCWP6	WPDCWPFR
WHAT DID WITH THE MONEY WITHDRAWN: OTHER	WPDCWP7	WPDCWP95

END OF FILTER

END OF FILTER

*IF current pension receipt = yes and defined benefit or defined contribution = defined contribution*  
 [QPENB.WPREC = YES AND (WPDCDB = DC OR WPDSP = DC OR WPPENT <> EMPLPS OR FF\_WPDCDB = DC) AND NOT (WPINCT IN [company,recom,different])]

**WPDDFV**

What is the current value of the fund that you are drawing your regular income from?  
 RANGE: 1..999997

*IF withdrawal amount = DK, RF*  
 [WPDCWA = DK,RF]

**WPDDFVB**

Is it.....  
 BRACKETS (2500, 7500, 25000, 100000)  
 [**Bracket results are recoded in wplual WPLUAU WPLUAE WPLUAR**]

END OF FILTER

END OF FILTER

*IF current pension receipt = yes and defined benefit or defined contribution = defined contribution and (newpension = new or pension receipt at last interview <>receiving)*  
 [IF WpRec = Yes AND (QPenA.WpDCDB = DC OR QpenB.WpDPsP = DC OR WpPenT <> EmplPS OR FF\_wpDCDB = DC) AND (FF\_WpRecp <> Receiving OR FF\_WPPrf = Residual)]

**WPDCRF**

Can i just check, is there any [^other] remaining fund associated with this pension?  
 INTERVIEWER: A FUND MANY REMAIN IF AN INDIVIDUAL DID NOT USE THEIR ENTIRE PENSION TO PURCHASE AN ANNUITY, OR IF THEY DID NOT MOVE THEIR ENTIRE PENSION INTO A DRAWDOWN ARRANGEMENT. DO NOT INCLUDE FUNDS THAT HAVE ALREADY BEEN REPORTED AS SEPARATE PENSIONS

1. Yes
2. No

END OF FILTER

*IF (some funds left in this pension) or (retained pensions rights in the scheme and pension type is defined contribution/not an employer pension)*  
 [WPDCRF = 1 OR (WPRGHX = 1 AND (WPDSP = 2 OR WPPENT <> 1 OR FF\_WPDCDB = 2)]

**WPDCFV**

What is the current [^remaining] value of your pension fund?  
 RANGE: 1..999997

IF fund value = DK, RF  
[WPDCFV = DK,RF]

**WPDCFVB**

Is it.....

BRACKETS (2500, 7500, 25000, 100000)

**[Bracket results are recorded in WPDCFVL WPDCFVU WPDCFVE WPDCFVR]**

END OF FILTER

END OF FILTER

(WpDCDB = DC OR WpDPsP = DC OR WpPenT <> 1 OR FF\_WpDCDB = DC) AND  
(WpRghX = 1 OR WpCurP = 1 OR (WpRec = Yes AND ((WPINCT <>1, 2 OR 3) OR  
WpDCRF = Yes)))

**WPDCP**

What do you plan to do with [^the remaining part of] [^your pension / the pension  
funds you just told me about]?

INTERVIEWER: READ OUT AND CODE ALL THAT APPLY

1. Purchase an annuity
2. Draw a regular income
3. Make a single lump sum withdrawal
4. Make multiple cash withdrawals
5. Haven't decided yet

END OF FILTER

Description	Variable	Archive
What plans to do with the remaining amount mentioned: purchase an annuity	WPDCP1	WPDCPAN
What plans to do with the remaining amount mentioned: draw a regular income	WPDCP2	WPDCPRG
What plans to do with the remaining amount mentioned: make a single lump sum withdrawal	WPDCP3	WPDCPSI
What plans to do with the remaining amount mentioned: make multiple cash withdrawals	WPDCP4	WPDCPMU
What plans to do with the remaining amount mentioned: haven't decided yet	WPDCP5	WPDCPDK
What plans to do with the remaining amount mentioned: purchase an annuity	WPDCP1	WPDCPAN
What plans to do with the remaining amount mentioned: draw a regular income	WPDCP2	WPDCPRG

IF current pension receipt = yes and (current or past pension at last interview <> past  
or pension receipt at last interview <>receiving) and (defined benefit or defined  
contribution at last interview = defined benefit)  
[IF (WpRec = Yes) AND ((FF\_WpCurP <> Past) OR (FF\_WpRecp <> Receiving))  
AND | ((QpenB.WpDPsP = DB) OR (FF\_WpDCDB = DB))]

**WPLUMPS**

Many pensions allow you to take a lump sum in addition to your pension income.  
Have you received a lump sum from this scheme?

- 1 Yes
- 2 No

*IF lump sum = YES [WPLUMPS = 1]*

**WPLUMPA**

How much was the lump sum?  
INTERVIEWER: ENTER POUNDS.  
RANGE: 1..999997

*IF lump sum amount <> RESPONSE [WPLUMPA = NONRESPONSE]*

**WPLMPAB**

Was it.....  
BRACKETS (2500, 5000, 15000, 50000)  
**[Bracket results are recoded in WPLUMPAL WPLUMPAU WPLUMPAE  
WPLUMPAR]**

END OF FILTER

END OF FILTER

END OF FILTER

**WPINFS**

From whom do you normally get information on how this pension scheme operates, for example, the benefits that you can expect to receive?

PROBE: WHO ELSE?

CODE ALL THAT APPLY

- 1 No information
- 2 Employer
- 3 Pension scheme reports
- 4 Colleagues
- 5 Financial press
- 6 Accountant
- 7 Independent financial adviser
- 8 Insurance or pension representative
- 9 Friends or family
- 95 Other

**[Code maximum 9 out of 10 possible responses]**

Description	Variable	Archive
Source of information on pension: no information	WPINFS1	WPIFSNO
Source of information on pension: employer	WPINFS2	WPIFSEM
Source of information on pension: pension scheme reports	WPINFS3	WPIFSRE
Source of information on pension: workmates	WPINFS4	WPIFSCO
Source of information on pension: financial press	WPINFS5	WPIFSPR
Source of information on pension: accountant	WPINFS6	WPIFSAC
Source of information on pension: independent financial advisor	WPINFS7	WPIFSFA
Source of information on pension: insurance/pension representative	WPINFS8	WPIFSRP
Source of information on pension: friends or family	WPINFS9	WPIFSFR
Source of information on pension: other	WPINFS95	WPIFS95

*IF pension information <> no information*

[WPINFS <> NOINFO]

**WPFINFO** [NAMED WPFINF IN DATASET]

Do you feel that you have received enough information about your expected pension at retirement?

- 1 YES
- 2 NO

END OF FILTER

IF INP >= FF\_NP

*IF whether current employer runs a pension scheme that the respondent is eligible to join = empty AND employment status = employee AND derived activity status = paid work, temporarily away from paid work, waiting to start paid work, already accepted AND number of pensions fed forward greater than 0*

*FF\_NP > 0 [(WPBPSTMP = EMPTY) AND (WPES = EMPLOYEE) AND (WPACTW = 1,2,3) AND (FF\_NP > 0)]*

**WPBSPC** [NAMED WPBPSP IN THE DATA]

Does your current employer offer a pension scheme which you are entitled to join?

- 1 Yes
- 2 No

*IF whether current employer offers pension scheme = YES*

*[WPBSPC = 1]*

**WPPSPC**

Are you a member of this pension scheme?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

*IF membership of current employer pension scheme <> YES*

*[WPPSPC <> 1]*

**WPMOREPC**

So far you have told us about [*list pensions already mentioned*]. Apart from state pensions, do you have any other pension schemes that you belong to now, or you had in the past? please include schemes which you are currently receiving an income from.

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

**END OF PENSIONS LOOP**

*IF (INP < FF\_NP OR WPPSPC = 1 OR WPMOREPC = 1) REPEAT QUESTIONS WPPENT TO WPMOREPC FOR NEXT PENSION.*

END OF PENSIONS LOOP

**Please note**

The remaining questions in this module are available in the main individual-level core dataset

*IF employment status = employee and derived activity status = paid work, temporarily looking for paid work, waiting to start paid work already accepted*  
 [(WPES =1) AND (WPACTW = 1,2,3)]

*IF scheme member = NO*

*[WPPS = 2]*

**WPPSM**

You said that you were not a member of the pension scheme your employer offers. Why aren't you a member of this 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)

***[Code maximum 5 out of 5 possible responses]***

Description	Variable	Archive
Preferred, or already had, other arrangement	WPPSM1	WPPSOT
Expected to move job	WPPSM2	WPPSEX
Could not afford payments	WPPSM3	WPPSAF
Not eligible to join	WPPSM4	WPPSEL
Other reason (specify)	WPPSM95	WPPS95

*IF reason not a member of pension scheme = other*

*[WPPSM = 95]*

**WPPSMO**

INTERVIEWER : WRITE IN OTHER ANSWER.

STRING: 40

***[Responses to WPPSMO are combined with multiple responses to WPPSM and recoded in binary variables]***

Description (Merged Variables)	Variable	Archive
Preferred, or already had, other arrangement	WPPSMM1	WPPSMOT
Expected to move job	WPPSMM2	WPPSMEX
Could not afford payments	WPPSMM3	WPPSMAF
Not eligible to join	WPPSMM4	WPPSMEL
Already have another pension	WPPSMM5	WPPSMAL
Age means it's too late now/too old so not worth it	WPPSMM6	WPPSMAG
Only work reduced hours/part time so not worth it	WPPSMM7	WPPSMHR
Did not like/understand scheme offered	WPPSMM8	WPPSMDL
Scheme not yet set up by employer	WPPSMM9	WPPSMNY

Other response (not codeable 1-8)	WPPSMM85	WPPSM85
Irrelevant response (not codeable 1-8)	WPPSMM86	WPPSM86

END OF FILTER

*IF reason not a member of the scheme <> not eligible*  
*[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 contributes to scheme = YES*  
*[WPEC = 1]*

**WPECA**

Would this be ...READ OUT...

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

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**WPEXW**

Some people receive a pension from a scheme which a **previous or late** husband, wife or civil partner contributed to. Do you expect to receive a pension from any schemes like this in the future? Please do not include any pensions you are already receiving an income from or that you have already told me about.

- 1 Yes
- 2 No

*IF ex-partner pension scheme = yes*  
*[WPEXW = YES]*

**WPSPOUP**

How much do you expect to receive from schemes like this in the future?

INTERVIEWER: ASK FOR PERIOD COVERED AND THEN THE AMOUNT.

PERIOD COVERED

- 1 Weekly
- 2 Monthly
- 3 Yearly

*IF scheme period = response*  
*[WPSPOUP = RESPONSE]*

**WPSPOU**

How much do you expect to receive from schemes like this in the future?



ENTER AMOUNT  
RANGE: 0..999997

END OF FILTER

END OF FILTER

*IF NON-PROXY INDIVIDUAL*

**WPRSAD**

[^Since your last interview/ over the last two years] from whom have you got information or advice about saving for retirement, your pension choices, or managing your retirement income?

CODE ALL THAT APPLY. PROBE: WHO ELSE?

1. Independent financial advisor (IFA)
2. Accountant
3. Bank, building society, or insurance company
4. Private pension provider
5. Employer
6. Pensionwise
7. Money advice service
8. The pension service
9. Other consumer bodies or charities (e.g. Citizens advice bureau, age uk)
10. Colleagues
11. Family or friends
12. Other
13. No one

Description	Variable	Archive
Independent financial advisor (ifa)	WPRSAD1	WPRSAD1
Accountant	WPRSAD2	WPRSAD2
Bank, building society, or insurance company	WPRSAD3	WPRSAD3
Private pension provider	WPRSAD4	WPRSAD4
Employer	WPRSAD5	WPRSAD5
Pensionwise	WPRSAD6	WPRSAD6
Money advice service	WPRSAD7	WPRSAD7
The pension service	WPRSAD8	WPRSAD8
Other consumer bodies or charities (e.g. citizens advice bureau, age uk)	WPRSAD9	WPRSAD9
Colleagues	WPRSAD10	WPRSAD10
Family or friends	WPRSAD11	WPRSAD11
Other	WPRSAD12	WPRSAD12
No one	WPRSAD13	WPRSAD13

END OF FILTER

*If non-proxy individual and reached state pension age = no*

[IAskPx <> Yes AND[ABVSPA[PNUM] =2]

**MANINT**

There may be a lot of uncertainty about how much income you will receive from your pension in the future, for example because of changes made by your pension

provider or changes to government pension policy. But many people still have some idea of the lowest and highest income they could possibly get.

INTERVIEWER: PRESS <1> AND <ENTER> TO CONTINUE.

#### **WPINCSPA**

Thinking about your future income from the state pension system, how much income do you expect to receive at state pension age?

INTERVIEWER ENTER AMOUNT AT THIS QUESTION, PERIOD AT THE NEXT.

ROUND TO THE NEAREST WHOLE £.

Range 0...999997

#### **WPINCSPAB**

INTERVIEWER: Code period at this question

1. Weekly
2. Every 4 weeks
3. Monthly
4. Yearly
5. One off/lump sum

#### **WPINCNSP**

If you added together your expected income from any occupational or personal pensions, but not your state pensions, how much income do you expect to receive at state pension age?

INTERVIEWER ENTER AMOUNT AT THIS QUESTION, PERIOD AT THE NEXT.

ROUND TO THE NEAREST WHOLE £.

Range 0...999997

#### **WPINCNSPB**

INTERVIEWER: Code period at this question

1. Weekly
2. Every 4 weeks
3. Monthly
4. Yearly
5. One off/lump sum

END OF FILTER

*IF (AgeP < 75) AND (AbvSPA = Yes)*

#### **WPSPD\***

[^Are you/is name] currently receiving any state pension income?

- 1 Yes
- 2 No

*If current state pension receipt = no*

*[WPSPD = 2]*

#### **WPSPD1A\***

Is this because...

- 1 [^You are/he/she is] not currently entitled to receive any state pension income
- 2 [^You are/he/she is] entitled to receive state pension income but have not claimed it yet

*IF reason not receiving state pension = not claimed*

[WPSPD1A = 2]

**WPSPD1B\***

Some people choose not to receive any state pension income when they first become entitled, in order that in the future they will receive either a lump sum payment or a higher weekly state pension income. This is known as state pension deferral. [^have you/has name] deferred [^your/his/her] state pension?"

- 1 Yes
- 2 No

*IF state pension deferral = yes*

[WPSPD1B = 1]

**WPSPD2\***

Which [^are you/is name] planning to claim in the future: a lumpsum or higher weekly income?"

- 1 Lump sum payment
- 2 Higher weekly state pension income
- 3 Have not decided yet

*If type of state pension claim = lump sum, higher weekly state pension income*

[WPSPD2 = 1,2]

**WPSPD3\***

At what age [^are you/is name] planning to [^claim/start claiming] this [^lump sum/higher pension scheme/lump sum or higher pension scheme]? You can tell me either at what age [^you are/he/she is] planning to [^claim/start claiming] or the month and year when [^you plan/he/she plans] to [^claim/start claiming]

INTERVIEWER: CODE HOW ANSWER IS GIVEN.

- 1 Age given
- 2 Month and year given

*IF age expect to claim state pension = age given*

[WPSPD3 = 1]

**WPSPD3A\***

INTERVIEWER: ENTER AGE AT WHICH RESPONDENT INTENDS TO

[^CLAIM/START CLAIMING]

RANGE : 50..100

END OF FILTER

*If age expect to claim state pension = month and year given [WPSPD3 = 2]*

**WPSPD3M\***

INTERVIEWER: ENTER MONTH IN WHICH RESPONDENT INTENDS TO

[^CLAIM/START CLAIMING]

**WPSPD3Y\***

INTERVIEWER: ENTER YEAR IN WHICH RESPONDENT INTENDS TO

[^CLAIM/START CLAIMING]

RANGE : 2007..2040

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*Else if current receipt of state pension = yes*

[WPSPD = 1]

**WPSPD4\***

When [^you/name] reached the state pension age did [^you/he/she]...

- 1 ...Start receiving your state pension immediately
- 2 Choose not to receive any state pension income initially in return for receiving a lump sum payment or a higher weekly state pension income from the government later on (also known as state pension deferral),
- 3 [women only] or, did you have to wait until your husband/ former husband reached state pension age before you became eligible for any state pension income?
- 4 Don't know

*IF start of state pension claim = deferral*

[WPSPD4 = 2]

**WPSPD5Y\***

For how long after reaching the state pension age did [^you/name] defer [^your/his/her] state pension?

INTERVIEWER: ENTER YEARS.

RANGE : 0..45

**WPSPD5M\***

For how long after reaching the state pension age did [^you/name] defer [^your/his/her] state pension?

INTERVIEWER: ENTER MONTHS.

RANGE : 0..12

**WPSPD6\***

When [^you/name] did start claiming [^your/his/her] state pension did [^you/he/she] choose to receive...

- 1 Lump sum payment
- 2 Higher weekly state pension income
- 3 Cannot remember

END OF FILTER

END OF FILTER

END OF FILTER

**WSPSY**

Do you know at what age in years and months you will reach the state pension age?

INTERVIEWER: ENTER NUMBER OF YEARS.

RANGE: 50..120

**WSPSAM**

Do you know at what age in years and months that you will reach the state pension age?

INTERVIEWER: ENTER NUMBER OF MONTHS.

RANGE: 0..11

IF current situation = retired, semiretired

[WPDES =1, 96]

IF no feed-forward data for age of retirement at last interview (NA, DK, REF, New partner

[IF FF\_WPRage = 9991, 9998, 9999, empty]

**WPRAGE\***

You said earlier that [^you/name] [^were/was] [^retired/semi-retired]. At what age did [^you/name] retire?

INTERVIEWER: ENTER AGE HERE.

RANGE: 0..120

END OF FILTER

END OF FILTER

IF current situation = retired, semiretired

[WPDES =1, 96]

IF no feed forward data for early retirement or No (NA, DK, REF, New partner or "no"

[FF\_WpERet = 9991, 9998, 9999, empty or 2]

**WPERETB\***

Did [^you/he/she] take early retirement, that is did [^you/name] retire before the normal retirement age in [^your/his/her] pension scheme?

- 1 Yes
- 2 No

IF taken early retirement = yes

[WPERETB =1]

**WPERP\***

When [^you/name] first retired, did [^you/he/she] retire on a ...READ OUT...

- 1 ... Full pension,
- 2 Reduced pension,
- 3 Or, no pension?

**WPREAS\***

SHOWCARD E10

What were [^your/name's] reasons for taking early retirement?

CODE ALL THAT APPLY.

- 01 Own ill health
- 02 Ill health of a relative/friend
- 03 Made redundant/dismissed/had no choice
- 04 Offered reasonable financial terms to retire early or take voluntary redundancy
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 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
- 88 To protect own health/health of partner
- 95 Other (specify)
- 96 None of these

97 Spontaneous: does not consider has retired early

**[Code maximum 14 out of 14 possible responses]**

Description	Variable	Archive
Own ill health	WPREAS1	WPREAOH
Ill health of a relative/friend	WPREAS2	WPREARH
Made redundant/dismissed/had no choice	WPREAS3	WPREARE
Offered reasonable financial terms to retire early or take voluntary redundancy	WPREAS4	WPREAVR
Could not find another job	WPREAS5	WPREAFI
To spend more time with partner/ family	WPREAS6	WPREAFFA
To enjoy life while still young and fit enough	WPREAS7	WPREAEN
Fed up with job and wanted a change	WPREAS8	WPREACH
To retire at the same time as husband/wife/partner	WPREAS9	WPREAST
To retire at a different time to husband/wife/partner	WPREAS10	WPREADT
To give the young generation a chance	WPREAS11	WPREAYO
Other (specify)	WPREAS95	WPREA95
None of these	WPREAS96	WPREA96
Spontaneous: does not consider has retired early	WPREAS97	WPREAOH

*IF reason for taking early retirement = other*  
*[WPREAS = 95]*

**WPOREA\***

INTERVIEWER: WRITE IN OTHER REASON.  
 STRING: 60

***[Open responses to wpreas are coded and when possible merged with the multiple responses to wprea]***

Description	Variable	Archive
Own ill health	WPREAM1	WPREAMOH
Ill health of a relative/friend	WPREAM2	WPREAMRH
Made redundant/dismissed/had no choice	WPREAM3	WPREAMRE
Offered reasonable financial terms to retire early or take voluntary redundancy	WPREAM4	WPREAMVR
Could not find another job	WPREAM5	WPREAMFI
To spend more time with partner/ family	WPREAM6	WPREAMFA
To enjoy life while still young and fit enough	WPREAM7	WPREAMEN
Fed up with job and wanted a change	WPREAM8	WPREAMCH
To retire at the same time as husband/wife/partner	WPREAM9	WPREAMST
To retire at a different time to husband/wife/partner	WPREAM10	WPREAMDT
To give the young generation a chance	WPREAM11	WPREAMYO
Moved home so took opportunity to leave	WPREAM12	WPREAMMV
To provide care to grandchildren	WPREAM13	WPREAMGC
Other (not codeable 1-11)	WPREAM85	WPREAM85
Irrelevant response	WPREAM86	WPREAM86
None of these	WPREAM95	WPREAM96
Spontaneous: does not consider has retired early	WPREAM96	WPREAMNO

END OF FILTER

*IF more than one reason for taking early retirement > 1*  
*[WPREAS.CARDINAL > 1]*

**WPMREA\***

SHOWCARD E10

What was [*^your/name's*] main reason for taking early retirement?

CODE ONE ONLY.

- 01 Own ill health
- 02 Ill health of a relative/friend
- 03 Made redundant/dismissed/had no choice
- 04 Offered reasonable financial terms to retire early or take voluntary redundancy
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 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

END OF FILTER

END OF FILTER

END OF FILTER

*IF offered early retirement incentives = no or reason for taking early retirement = does not consider self to have retired early or (offered early retirement incentives <> response and (No feed-forward data for offered early retirement incentives (NA, DK, REF, New partner and (No feed-forward data for reason for retiring (NA, DK, REF, new partner )*  
*[IF (WPERetB = No) OR (notretire IN WpReas) OR (WpEretB <> RESPONSE AND (FF\_WPEret = 9991, 9998, 9999, empty) AND (FF\_WPRre = 9991, 9998, 9999, empty)]*

**WPRRE\***

SHOWCARD E11

What were [*^your/name's*] reasons for retiring?

CODE ALL THAT APPLY.

- 01 Reached retirement age
- 02 Own ill health
- 03 Ill health of a relative/friend
- 04 Made redundant/dismissed/had no choice
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 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
- 88 To protect own health/health of partner

- 95 Other (specify)
- 96 None of these

**[Code maximum 13 out of 13 possible responses]**

Description	Variable	Archive
Reached retirement age	WPRRE1	WPRRAG
Own ill health	WPRRE2	WPRROH
Ill health of a relative/friend	WPRRE3	WPRRRH
Made redundant/dismissed/had no choice	WPRRE4	WPRRRE
Could not find another job	WPRRE5	WPRRFI
To spend more time with partner/ family	WPRRE6	WPRRFA
To enjoy life while still young and fit enough	WPRRE7	WPRREN
Fed up with job and wanted a change	WPRRE8	WPRRCH
To retire at the same time as husband/wife/partner	WPRRE9	WPRRST
To retire at a different time to husband/wife/partner	WPRRE10	WPRRDT
To give the young generation a chance	WPRRE11	WPRRYO
Other (specify)	WPRRE95	WPRR95
None of these	WPRRE96	WPRR96

*IF reason for retirement = other*  
*[WPRRE = 95]*

**WPORRE\***

INTERVIEWER: WRITE IN THE OTHER REASON.  
 STRING: 60

**[open responses to WPRRE are coded and when possible merged with the multiple responses to WPORRE]**

DESCRIPTION (Merged Variables)	ARCHIVE
Reached retirement age	WPRREMAG
Own ill health	WPRREMOH
Ill health of a relative/friend	WPRREMRH
Made redundant/dismissed/had no choice	WPRREMRE
Could not find another job	WPRREMF1
To spend more time with partner/ family	WPRREMFA
To enjoy life while still young and fit enough	WPRREMEN
Fed up with job and wanted a change	WPRREMCH
To retire at the same time as husband/wife/partner	WPRREMST
To retire at a different time to husband/wife/partner	WPRREMDT
To give the young generation a chance	WPRREMYO
Life event – (re)married/moved house/death of spouse	WPRREMLI
Could afford to	WPRREMAF
Other response (not codeable 1-13)	WPRREM85
Irrelevant response	WPRREM86
None of these	WPRREM96

END OF FILTER

*IF more than one reason for retirement > 1*  
*[WPRRE.CARDINAL > 1]*



**WPMRRE\***

SHOWCARD E11

What was [<sup>^</sup>your/<sup>^</sup>name]'s] main reason for retiring?

CODE ONE ONLY

- 01 Reached retirement age
- 02 Own ill health
- 03 Ill health of a relative/friend
- 04 Made redundant/dismissed/had no choice
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 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

END OF FILTER

*IF reason for retirement = reached retirement age and reason for retirement <> made redundant  
[(WPRRE = 1) AND (WPRRE <> 4)]*

**WPWKR\***

Did [<sup>^</sup>you/<sup>^</sup>name]'s] have the opportunity to work past retirement age?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

END OF FILTER

**WPPHI\***

[<sup>^</sup>Are you/is <sup>^</sup>name]] covered by private health insurance, whether in [<sup>^</sup>your/his/her] own name or through another family member?

INTERVIEWER: DON'T INCLUDE DENTAL OR FRIENDLY PLANS.

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 covered by private health insurance = yes, in own name*

*[WPPHI = 1]*

*IF (employment status = self-employed and derived activity status = paid work, temporarily away from paid work) or not (derived activity status = paid work, temporarily away from paid work)*

*[(WPES = SELFEMP) AND (WPACTW=1,2)) OR NOT (WPACTW=1,2)]*

**WPHOWU\***

How is this health insurance paid for?

- 1 Paid for by [<sup>^</sup>you/<sup>^</sup>name]]
- 2 Paid for by someone else

*IF who pays for health insurance = someone else*  
[WPHOWU = 2]

**WPHLWHO\***

INTERVIEWER: WRITE IN WHO PAYS FOR THE INSURANCE.  
STRING: 40

**[Open responses to wphlwho are coded and reported in WPHLWZ]**

**WPHLWZ**

- 1 PARTNER/HUSBAND/WIFE
- 2 OTHER FAMILY MEMBER
- 3 COMPANY/EMPLOYER
- 4 PENSION FUND
- 85 OTHER ANSWER - NOT CODEABLE 01-04
- 86 IRRELEVANT RESPONSE - NOT CODEABLE 01-04

END OF FILTER

END OF FILTER

*IF (employment status = employee and derived activity status = paid work,  
temporarily away from paid work)*  
[(WPES = EMPLOYEE) 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

END OF FILTER

*If how health insurance paid for = respondent pays or who pays for health  
insurance = respondent*  
[(WPHOWE = 1) OR (WPHOWU = 1)]

**WPMHI\***

How much [**^do you/does ^name**] pay per month for this insurance?  
Please include the contribution for all family members covered by insurance in  
[**^your/his/her**] name.

INTERVIEWER: WRITE IN AMOUNT.  
RANGE: 0..999997

*IF amount pay for health insurance = DK, RF*  
[(WPMHI = DK) OR (WPMHI = RF)]

**WPMHLB\***

IS IT.....

BRACKETS (500, 1000, 2000, 5000)

**[Bracket results are recoded in WPMHIL WPMHIU WPMHIE WPMHIR]**

END OF FILTER

END OF FILTER

END OF FILTER

**WPX**

INTERVIEWER: THE WORK AND PENSIONS SECTION IS FINISHED.  
PLEASE ENTER 1 HERE TO MAKE THE PROGRAM STORE THE CURRENT TIME  
AND DATE.

1 PRESS <1> AND <ENTER> TO CONTINUE.

## 6 - INCOME AND ASSETS MODULE (IA)

### IAINTRO\*

We are interested in how people are managing financially these days. Some people's income varies over time and so in order to clearly understand how people are managing financially, we need to consider their situation in the last year rather than just over the last month.

[^BLANK / Even though [^partner's name] is not living here at the moment, we are still interested in any income that [^he / she] may receive or income that is paid to [^you / [^name]] on their behalf. Please include any income that is paid directly to social services or to the home they are staying in.]

The next questions are about types of income [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] may [^receive / have received]. We may have asked [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] some of the details earlier but it is important for us to check that we understand [^your / [^name's]] situation correctly.

INTERVIEWER: Press <1> and <Enter> to continue

1 Continue

2 Refuses to answer about husband/wife

### IAWORK\*

Did [^you / [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] do any work for pay in the last year (that is since [^date a year ago])?

ASK OR CODE.

1 Yes

2 No

*IF whether did paid work in last year = yes*

| [IAWork = 1]

### IASINC\*

About how much wage and salary income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive in the last year before taxes and other deductions?

| Range: 0..999997

*[CHECK IA1] SIGNAL: IF wage and salary income greater than £200,000*

*IF [IASINC > 200,000]*

*INTERVIEWER: Are you sure? £^IASinc seems high - please check.*

*IF wage and salary income = DK, RF*

| [IaSinc=DK,RF]

### IASINCB\*

Was it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 20000, 35000, 100000)

*[Bracket results are recoded in IASINCL IASINCUC IASINCE IASINCR]*

END OF FILTER

END OF FILTER

**IASPEN\***

Did [**^you / ^name**] [**^BLANK / or ^your / his / her**] [**^husband / wife / partner**] receive any money from a state pension in the last year (that is since [**^date a year ago**]?)

INTERVIEWER: Include basic state pension and SERPS.

1 Yes

2 No

*IF ((whether received state pension in last year = yes) AND (whether partner in household = yes)) AND NOT (continued with module IA = RF)  
[[(!laSPen = 1) AND (IAask = 1)) AND NOT (IAIntro = 2)]*

**IASPW\***

Which of [**^you / them**] received the state pension in the last year?

1 Respondent only

2 Spouse / partner only

3 Both

*[CHECK IA2] SIGNAL: IF Respondent is receiving pension and is Not of retirement age*

*IF [ (IASPW=1 or 3) AND (Respondent age<66)]*

*INTERVIEWER: Respondent says they are receiving the state pension before the age of retirement, please check.*

*[CHECK IA3] SIGNAL: IF Spouse/partner is receiving pension and is NOT of retirement age*

*IF [ (IASPW=1 or 3) AND (Spouse/partner age<66)]*

*INTERVIEWER: Respondent says they are receiving the state pension before the age of retirement, please check. [(^dmname[icouplen[pnum]] is only ^dmage[icouplen[pnum]])]*

END OF FILTER

*IF ((whether received state pension in last year = yes) AND (whether partner in household <> yes))*

*OR (who received state pension = respondent, both)*

*[[(!laSPen = 1) AND (IAask <> 1)) OR (IASPW = 1, 3)]*

**IASPA\***

How much [**^do you / does ^name**] receive from the state pension?

INTERVIEWER: CODE PERIOD COVERED.

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two Calendar months

08 Eight times a year

09 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 covered by state pension = RESPONSE*

*[lasPa = RESPONSE]*

**IAPAM\***

INTERVIEWER: ENTER AMOUNT.

Round to the nearest pound

If the amount is not known because it is paid with benefits, enter the total amount received here.

Range: 0..99997

*[CHECK IA4] SIGNAL: IF state pension is more than £300 a week OR more than £600 every two weeks OR more than £1200 every four weeks/months or more than £15000 for every other time periods.*

*IF [(IASPA=1 AND IAPAM>300) OR (IASPA=2 AND IAPAM>600) OR (IASPA=3 AND IAPAM>1200) OR (IASPA = any (3 or 7 to 95) AND IAPAM>15000)] (*

*INTERVIEWER: Are you sure? £^IaPam seems high - please check.*

END OF FILTER

*IF period covered = DK RF OR (state pension amount = DK, RF) (IaPAM = DK, RF)]*

*IF period covered by state pension = one week*

*[lasPa = 1]*

**IASPWB\***

Is it less than [**^amount**], more than [**^amount**] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAPAMWL IAPAMWU IAPAMWE IAPAMWR]**

*ELSE IF period covered by state pension = two weeks [lasPa = 2]*

**IASPFB\***

Is it less than [**^amount**], more than [**^amount**] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAPAMFL IAPAMFU IAPAMFE IAPAMFR]**

*ELSE IF period covered by state pension = four weeks, one month] [lasPa = [4, 5]]*

**IASPMB\***

Is it less than [**^amount**], more than [**^amount**] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAPAMML IAPAMMU IAPAMME IAPAMMR]**

*ELSE IF period covered by state pension = [one year, lump sum] [lasPa = [52, 95]]*

**IASPYB\***

Is it less than [**^amount**], more than [**^amount**] or what?

BRACKETS (2500, 4000, 5000, 7500)

**[Bracket results are recoded in IAPAMYL IAPAMYU IAPAMYE IAPAMYR]**

*ELSE if period covered = DK RF*

**IASPOB\***

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAPAMOL IAPAMOU IAPAMOE IAPAMOR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF who received state pension = spouse / partner, both*

*[laSPW = 2, 3]*

**IASPP\***

How much [^does / did] [^your / his / her] [^husband / wife / partner] receive from the state pension?

INTERVIEWER: CODE PERIOD COVERED.

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two Calendar months

08 Eight times a year

09 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 covered by partner's state pension = RESPONSE*

*[laSPp = RESPONSE]*

**IAPPAM\***

INTERVIEWER: ENTER AMOUNT.

If the amount is not known because it is paid with benefits, enter the total amount received here.

Range: 0..99997

*[CHECK IA5] SIGNAL: IF partner's state pension is more than £300 a week OR more than £600 every two weeks OR more than £1200 every four weeks/months or more than £15000 for every other time periods.*

*IF [(IASPP=1 AND IAPPAM>300) OR (IASPP=2 AND IAPPAM>600) OR (IASPP=3 AND IAPPAM>1200) OR (IASPP = any (3 or 7 to 95) AND IAPPAM>15000)] (*

*INTERVIEWER: Are you sure? £^IAPPam seems high - please check.*

END OF FILTER

*IF (period covered by partner's state pension = DK,RF) OR (state pension amount = DK,RF)*

*[(IaSPp = DK,RF) OR (IaPPAm = DK, RF)]*

*IF period covered by partner's state pension = one week*

*[IaSPp = 1]*

**IAPPWB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

***[Bracket results are recoded in IAAPAWL IAAPAWU IAAPAWE IAAPAWR]***

*ELSE IF period covered by partner's state pension = two weeks [IaSPp = 2]*

**IAPPFB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

***[Bracket results are recoded in IAAPAFU IAAPAFE IAAPAFR]***

*ELSE IF period covered by partner's state pension = four weeks, one month [IaSPp = [4, 5]]*

**IAPPMB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

***[Bracket results are recoded in IAAPAML IAAPAMU IAAPAME IAAPAMR]***

*ELSE IF period covered by partner's state pension = [one year, lump sum] [IaSPp = [52, 95]]*

**IAPPYB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 4000, 5000, 7500)

***[Bracket results are recoded in IAAPAYL IAAPAYU IAAPAYE IAAPAYR]***

*ELSE*

**IAPPOB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

***[Bracket results are recoded in IAAPAOL IAAPAOU IAAPAOE IAAPAOR]***

*END OF FILTER*

*END OF FILTER*

*END OF FILTER*

**IAPPEN\***

Did [^you / ^name] [^BLANK / or [^your / his / her] [^husband / wife / partner]] receive any money from a personal or employer pension in the last year (that is since [^date a year ago])?

If Yes: You can tell me either a yearly total or monthly amounts.

1 Yes, monthly



2 Yes, yearly

3 No

*IF whether received personal or employer pension in last year = yes, monthly*

*[IaPPen = 1]*

**IAPPMO\***

About how much income did [*^you / ^name*] [*^BLANK / and ^your / his / her*] [*^husband / wife / partner*] receive in the last month from personal or employer pensions before taxes and other deductions?

INTERVIEWER: DO NOT INCLUDE ANY LUMP SUMS RECEIVED.

Range: 0..999997

END OF FILTER

*[CHECK IA6] SIGNAL: IF amount received from personal employer pension is greater than £60,000.*

*IF [IAPPMO>60000]*

*INTERVIEWER: Are you sure? £^IaPPEI seems high - please check.*

*IF (amount received personal or employer pension = DK,RF)*

*[IaPPMO = DK, RF]*

**IAPPMOB\***

Was it less than [*^amount*], more than [*^amount*] or what?

BRACKETS (1500, 4000, 8000, 30000)

***[Bracket results are recoded in IAPPMOL IAPPMOU IAPPMOE IAPPMOR]***

END OF FILTER

*IF whether received personal or employer pension in last year = yes, yearly*

*[IaPPen = 2]*

**IAPPEI\***

About how much income did [*^you / ^name*] [*^BLANK / and ^your / his / her*] [*^husband / wife / partner*] receive in the last year from personal or employer pensions before taxes and other deductions?

INTERVIEWER: DO NOT INCLUDE ANY LUMP SUMS RECEIVED.

Range: 0..999997

*[CHECK IA7] SIGNAL: IF amount received by personal or employer pension is greater than £60,000IF [IAPPEI>60000]*

*INTERVIEWER: Are you sure? £^IaPPEI seems high - please check.*

END OF FILTER

*IF (amount received personal or employer pension = DK, RF)*

*[IaPPEI = DK, RF]*

**IAPPEIB\***

Was it less than [*^amount*], more than [*^amount*] or what?

BRACKETS (1500, 4000, 8000, 30000)

***[Bracket results are recoded in IAPPEIL IAPPEIU IAPPEIE IAPPEIR]***

END OF FILTER

**IAANIN\***

Apart from any pension annuity income and anything else you have already told me about, did [**^you / ^name**] [**^BLANK / or ^your / his / her**] [**^husband / wife / partner**] receive any annuity income in the last year (that is since [**^date a year ago**]?)

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 ((whether any other annuity income in last year = yes) AND (whether partner in household = yes)) AND NOT (continued with module IA = RF)*

*[[(!aAnIn = 1) AND (IAask = 1)) AND NOT (IAIntro = 2)]*

**IAAILY\***

Which of [**^you / them**] received annuity income in the last year?

1 Respondent only

2 Spouse / partner only

3 Both

END OF FILTER

*IF (who received annuity income in last year = respondent, both) OR (whether any other annuity income in last year = yes) AND (whether partner in household too <> yes)*

*[(!aAlly = [1, 3]) OR ((!aAnIn = 1) AND (IAask <> 1))]*

**IAAIM\***

How much annuity income did [**^you / ^name**] receive in the last year after tax?

Range: 0..999997

*[CHECK IA8] SIGNAL: IF annuity income amount in last year is greater than £30,000*

*IF [!aAim > 30000]*

*INTERVIEWER: Are you sure? £^!aAim seems high - please check.*

*IF (annuity income amount in last year = DK, RF)*

*[!aAim = DK]*

**IAAIMB\***

Was it less than [**^amount**], more than [**^amount**] or what?

BRACKETS (400, 1000, 2000, 15000)

**[Bracket results are recoded in IAAIML IAAIMU IAAIME IAAIMR]**

END OF FILTER

END OF FILTER

*IF who received annuity income in last year = spouse / partner, both]*

*[!aAlly = 2, 3]*

**IAAIP\***

How much annuity income did [**^your / his / her**] [**^husband / wife / partner**] receive in the last year after tax?

Range: 0..999997

**[CHECK IA9] SIGNAL:** IF annuity income partner received in last year is greater than £30,000.

[!aAip > 30000]

INTERVIEWER: Are you sure? £^!aAip seems high - please check.

IF (annuity income partner received in last year = DK, RF) [!aAip = DK,RF]

**IAAIPB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (400, 1000, 2000, 15000)

**[Bracket results are recoded in IAAIPL IAAIPU IAAIPE IAAIPR]**

END OF FILTER

END OF FILTER

**IAHDBC\***

**SHOWCARD F1**

[^Are you / Is your husband / wife / partner] receiving any of these health or disability benefits at the moment?

INTERVIEWER: ONLY INCLUDE BENEFITS THAT THE RESPONDENT IS CURRENTLY RECEIVING.

1 Yes

2 No

IF health or disability benefit receipt = yes

[!ahdbc=1]

**IAHDN\***

**SHOWCARD F1**

Which of these health or disability benefits [^are you / is [^name]] receiving at the moment?

PROBE: What others?

CODE ALL THAT APPLY

IF respondent asks about Disabled Persons Tax Credit or Disability Working Allowance, explain that this benefit was abolished in April 2003 and became part of the Working Tax Credit.

01 Incapacity Benefit previously Invalidity Benefit

02 Employment and Support Allowance

03 Severe Disablement Allowance SDA

04 Statutory Sick Pay SSP

05 Attendance Allowance

06 Personal Independence Payment (including the car allowance known as Motability)

07 Disability Living Allowance

08 Industrial Injuries Disablement Benefit

09 War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme

10 Carer's Allowance

95 Some other benefit for people with disabilities (SPECIFY)

96 None of these

**[code maximum 9 out of 10 possible responses]**

**Multiple responses to IAHDN are recoded in variables:**

Description	Variable	Archive
Incapacity Benefit previously Invalidation Benefit	iahdn1	IAHDNIB
Employment and Support Allowance	iahdn2	IAHDNES
Severe Disablement Allowance SDA	iahdn3	IAHDNSD
Statutory sick pay SSP	iahdn4	IAHDNSP
Attendance Allowance	iahdn5	IAHDNAA
Personal Independence Payment (including the car allowance known as motability)	iahdn6	IAHDNPI
Disability Living Allowance	iahdn7	IAHDNDL
Industrial Injuries Disablement Benefit	iahdn8	IAHDNII
War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme	iahdn9	IAHDNWD
Carer's Allowance	iahdn10	IAHDNCA
Some other benefit for people with disabilities (SPECIFY)	iahdn95	IAHDN95
None of these	iahdn96	IAHDN96

**[CHECK IA10] CHECK:** IF selects "None of these" AND any other response at IAHDN

IF [IAHDN= 96 AND (IAHDN= any 1 to 95)]

INTERVIEWER: 'None' is an exclusive code at this question. Please change!

IF health or disability benefit type = other [IAHDN = 95]

**IAHDNO\***

INTERVIEWER: ENTER THE NAME OF THE OTHER BENEFIT

String [40]

END OF FILTER

**[Responses to IAHDNO are coded and where possible merged with the answers to IAHDN in variables IAHDNIB IAHDMES IAHDMSD IAHDMSD IAHDMSD IAHDMAA IAHDMDL IAHDNII IAHDNWD IAHDNCA IAHDN85 IAHDN95 IAHDN96]**

END OF FILTER

IF (health or disability benefit type = RESPONSE) AND NOT (health or disability benefits type = none) [(IahdN = RESPONSE) AND NOT (IahdN =96)]

LOOP FOR EACH HEALTH OR DISABILITY BENEFIT CURRENTLY RECEIVING (from IAHDN)

\*Please note that codes 6 and 7 in IAHDN have changed meaning over the waves with the changes to benefits available. Therefore variables of the same name from benefit blocks 6 and higher do not consistently refer to the same categories across waves.

**IAP\***

How much did [^you / ^name] / [^your / ^name's]] [^husband / wife / partner]] [^BLANK / usually] receive from [^Incapacity benefit previously named invalidity benefit / Employment and Support Allowance / Severe Disablement Allowance SDA / Statutory sick pay SSP / Attendance Allowance / Disability Living Allowance / Industrial Injuries Disablement Benefit / War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme / Carer's Allowance.] [^BLANK / last time]?

INTERVIEWER: CODE PERIOD COVERED.

01 One week  
02 Two weeks  
03 Three weeks  
04 Four weeks  
05 Calendar month  
07 Two Calendar months  
08 Eight times a year  
09 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)

**[Answers for each health or disability benefit currently receiving (from IAHDN) are recoded in IAP to IAP11]**

*IF period amount covers = RESPONSE*  
*[IaP = RESPONSE]*

**IAA\***

INTERVIEWER: Enter the amount. Round to the nearest pound.

[^BLANK / If don't know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each health or disability benefit currently receiving (from IAHDN) are recoded in IAA to IAA11]**

END OF FILTER

*IF (period amount covers = DK, RF) OR (amount received =DK, RF)*  
*[(IaP = DK, RF) OR (IaA = DK, RF)]*

*IF period amount covers = one week [IaP = 1]*

**IAWB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA1WL IAA1WU IAA1WE IAA1WR to IAA11WL IAA11WU IAA11WE IAA11WR]**

*ELSE IF period amount covers = two weeks [IaP = 2]*

**IAFB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA1FL IAA1FU IAA1FE IAA1FR to IAA11FL IAA11WU IAA11FE IAA11FR]**

*ELSE IF period amount covers = four weeks, one month [IaP = [4, 5]]*

**IAMB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA1ML IAA1MU IAA1ME IAA1MR to IAA11ML IAA11MU IAA11ME IAA11MR]**

*ELSE IF period amount covers = one year, lump sum [IaP = [52, 95]]*

**IAYB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 3750, 5000, 7500)

**[Bracket results are recoded in IAA1YL IAA1YU IAA1YE IAA1YR to IAA11YL IAA11YU IAA11YE IAA11YR]**

*ELSE IF period amount covers = DK or RF [Iap = DK or RF]*

**IAOB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA1OL IAA1OU IAA1OE IAA1OR to IAA11OL IAA11OU IAA11OE IAA11OR]**

END OF FILTER

END OF FILTER

END OF LOOP

END OF FILTER

*IF whether partner in household = yes AND continued with module IA = continued  
[(IAask = 1) AND (IAIntro = 1)]*

**IAHDPN\***

**SHOWCARD F1**

Which of these health or disability benefits is [^your / his / her] [^husband / wife / partner] receiving at the moment?

PROBE: What others?

CODE ALL THAT APPLY

01 Incapacity Benefit previously Invalidity Benefit

02 Employment and Support Allowance

03 Severe Disablement Allowance SDA

04 Statutory sick pay SSP

05 Attendance Allowance

06 Personal Independence Payment (including the car allowance known as Motability)

07 Disability Living Allowance

08 Industrial Injuries Disablement Benefit

09 War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme

10 Carer's Allowance

95 Some other benefit for people with disabilities (SPECIFY)

96 None of these

**[code maximum 9 out of 10 possible responses]**

Description	Variable	Archive
Incapacity Benefit previously Invalidation Benefit	iahdpn1	IAHDPNIB
Employment and Support Allowance	iahdpn2	IAHDPNES
Severe Disablement Allowance SDA	iahdpn3	IAHDPNSD
Statutory sick pay SSP	iahdpn4	IAHDPNSP
Attendance Allowance	iahdpn5	IAHDPNAA
Personal Independence Payment (including the car allowance known as motability)	iahdpn6	IAHDPNPI
Disability Living Allowance	iahdpn7	IAHDPNDL
Industrial Injuries Disablement Benefit	iahdpn8	IAHDPNII
War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme	iahdpn9	IAHDPNWD
Carer's Allowance	iahdpn10	IAHDPNCA
Some other benefit for people with disabilities (SPECIFY)	iahdpn95	IAHDPN95
None of these	iahdpn96	IAHDPN96

*[CHECK IA11] CHECK: IF selects "None of these" at IAHDPN AND any other response*

*IF [IAHDPN=96 AND (IAHDPN= any 1 to 95)]*

*INTERVIEWER: 'None' is an exclusive code at this question. Please change!*

*IF (partner's health or disability benefit type = other) AND (whether post-interview editing question <> yes OR (partner's health or disability benefits = EMPTY, other)) [(lahdp = 95) AND (EditQre <> 1 OR (lahdpz = [EMPTY, 95]))]*

**IAHDPO\***

INTERVIEWER: ENTER THE NAME OF OTHER BENEFIT  
String 40

END OF FILTER

*[Open answers to IADHPO are coded and where possible merged with the answers to IAHDP in variables IAHDPMIB IAHDPMES IAHDPMSD IAHDPMSP IAHDPMMA IAHDPMDL IAHDPMII IAHDPMWD IAHDPMCA IAHDPM85 IAHDPM86 IAHDPM96]*

END OF FILTER

*IF (benefits partner is receiving at the moment = RESPONSE) AND NOT (benefits partner is receiving at the moment = none)  
[(lahdPn = RESPONSE) AND NOT (lahdp= 96)]*

**LOOP FOR EACH HEALTH OR DISABILITY BENEFIT PARTNER IS CURRENTLY RECEIVING**

**IAP\***

How much did [^you / ^name] / [^your / ^name's]] [^husband / wife / partner] [^BLANK / usually] receive from [^Incapacity Benefit (previously Invalidation Benefit) / Severe Disablement Allowance (SDA) / Statutory sick pay (SSP) etc.] [^BLANK / last time]?

INTERVIEWER: CODE PERIOD COVERED.

01 One week

02 Two weeks

03 Three weeks

04 Four weeks  
05 Calendar month  
07 Two Calendar months  
08 Eight times a year  
09 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)

**[Answers for each health or disability benefit currently receiving (from IAHDPN) are recoded in IAP12 to IAP22]**

*IF period amount covers = RESPONSE [IaP = RESPONSE]*

**IAA\***

INTERVIEWER: ENTER THE AMOUNT.

[^BLANK / If Don't Know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each health or disability benefit currently receiving (from IAHDPN) are recoded in IAA12 to IAA22]**

END OF FILTER

*[CHECK IA12] SIGNAL: IF \*calculated from IAP and IAA\* is on average more than £300 per week*

*INTERVIEWER: The amount ^IaA over a period of ^iaatxt is on average more than £300 per week. Please check.*

*IF (period amount covers = DK, RF) OR (amount received = DK, RF)  
[(IaP = DK, RF) OR (IaA = DK, RF)]*

*IF period amount covers = one week  
[IaP = 1]*

**IAWB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA12WL IAA12WU IAA12WE IAA12WR to IAA22WL IAA22WU IAA22WE IAA22WR]**

*ELSE IF period amount covers = two weeks [IaP = 2]*

**IAFB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA12FL IAA12FU IAA12FE IAA12FR to IAA22FL IAA22FU IAA22FE IAA22FR]**



ELSE IF period amount covers =four weeks, one month [laP = 4, 5]

**IAMB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA12ML IAA12MU IAA12ME IAA12MR to IAA22ML IAA22MU IAA22ME IAA22MR]**

ELSE IF period amount covers = one year, lump sum [laP = 52, 95]

**IAYB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 3750, 5000, 7500)

**[Bracket results are recoded in IAA12YL IAA12YU IAA12YE IAA12YR to IAA22YL IAA22YU IAA22YE IAA22YR]**

ELSE IF period amount covers = DK or RF [laP = DK or RF]

**IAOB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA12OL IAA12OU IAA12OE IAA12OR to IAA22OL IAA22OU IAA22OE IAA22OR]**

END OF FILTER

END OF FILTER

END OF LOOP

END OF FILTER

**IABEBC\***

**SHOWCARD F2**

[^Are you / Is [^your husband / wife / partner]] receiving any of these benefits at the moment? INTERVIEWER: Do not include housing benefit, council tax benefit or winter fuel allowance as "other". These are covered by later questions.

Only include benefits that the respondent is currently receiving

1 Yes

2 No

IF whether receiving benefits = yes

[laBeB = 1]

**IABEN\***

**SHOWCARD F2**

Which of these benefits [^are you / is [^name]] receiving at the moment?

PROBE: What others? CODE ALL THAT APPLY.

[^BLANK / If respondent is aged 60 or over and says they are currently receiving Income Support or Minimum Income guarantee (MIG) explain that this benefit was replaced in October 2003 with Pension Credit.]

01 Universal Credit

02 Income Support

03 Pension Credit (income support for the over 60s, replaced Minimum Income

- Guarantee in October 2003)  
 04 Working Tax Credit (formerly part of Working Families Tax Credit)  
 05 Job-seeker's Allowance formerly Unemployment Benefit  
 06 Guardian's Allowance  
 07 Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance  
 08 Child Benefit  
 09 Child Tax Credit  
 95 Some other State Benefit (SPECIFY)  
 96 None of these

**[code maximum 9 out of 10 possible responses]**

Description	Variable	Archive
Universal Credit	laBeN1	labenuc
Income Support	laBeN2	labenis
Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003)	laBeN3	labenpc
Working Tax Credit (formerly part of Working Families Tax Credit)	laBeN4	labentc
Job-seeker's Allowance formerly Unemployment Benefit	laBeN5	labenja
Guardian's Allowance	laBeN6	labenga
Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance	laBeN7	labenwp
Child Benefit	laBeN8	labencb
Child Tax Credit	laBeN9	labencc
Some other State Benefit (SPECIFY)	laBeN95	laben95
None of these	laBeN96	laben96

*IF benefits received = other [laBen = 95]*

**IABENO\***

INTERVIEWER: ENTER THE NAME OF THE OTHER BENEFIT

***Open responses to IABENO are coded and where possible merged with the multiple responses to IABEN in variables:***

Description	Variable	Archive
Universal Credit	laBeNM1	labenmuc
Income Support	laBeNM2	labenmis
Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003)	laBeNM3	labenmpc
Working Tax Credit (formerly part of Working Families Tax Credit)	laBeNM4	labenmtc
Job-seeker's Allowance formerly Unemployment Benefit	laBeNM5	labenmja
Guardian's Allowance	laBeNM6	labenmga
Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance	laBeNM7	labenmwp

Child Benefit	laBeNM8	labenmcb
Child Tax Credit	laBeNM9	labenmcc
Other 50_ employment credit	laBeNM51	labenmec
Other answer - not codeable 01 to 51	laBeNM85	labenm85
Irrelevant response - not codeable	laBeNM85	labenm86
None of these	laBeNM95	labenm96

END OF FILTER

*[CHECK IA13] CHECK: IF selects "none of these" AND any other response at IABEN  
IF [IABEN= 96 AND IABEN= any 1 to 95]  
EDITOR: 'None' is an exclusive code at this question. Please change!*

*[CHECK IA14] CHECK: IF respondent is older than 60 and receives Income support  
(or MIG)  
IF [IABEN=2 AND RespAge>60]  
INTERVIEWER: Income Support or MIG is no longer available to people aged 60 or  
over. This benefit was replaced with the Pension Credit. Please change!*

END OF FILTER

*IF (benefits received at the moment = RESPONSE) AND NOT (benefits received at  
the moment = none)*

*[(laBeN = RESPONSE) AND NOT (laBeN = 96)]*

LOOP FOR EACH WORK AND INCOME BENEFIT CURRENTLY RECEIVING

**IAP\***

How much did [<sup>^</sup>you / [<sup>^</sup>name] / [<sup>^</sup>your / [<sup>^</sup>name's]] [<sup>^</sup>husband / wife / partner]]  
[<sup>^</sup>BLANK / usually] receive from [<sup>^</sup>Income Support / Pension Credit (income  
support for the over 60's, replaced Minimum Income Guarantee in October 2003) /  
Working Tax Credit (formerly part of Working Families Tax Credit) / Job-seeker's  
Allowance formerly Unemployment Benefit / Guardian's Allowance / Widow's  
pension or Widowed mother's allowance or Widowed Parent's allowance or  
Bereavement allowance / Child Benefit /Child Tax Credit] [<sup>^</sup>BLANK / last time]?

INTERVIEWER: CODE PERIOD COVERED.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 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)

***[Answers for each work or income benefit currently receiving (from IABEN)  
are recoded in IAP23 to IAP32]***

*IF period amount covers = RESPONSE [IaP = RESPONSE]*

**IAA\***

INTERVIEWER: ENTER THE AMOUNT.

[^BLANK / If Don't Know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each work or income benefit currently receiving (from IABEN) are recoded in IAA23 to IAA32]**

END OF FILTER

*IF (period amount covers = DK, RF) OR (amount received =DK, RF)  
[(IaP = DK, RF) OR (IaA = DK, RF)]*

*IF period amount covers = one week  
[IaP = 1]*

**IAWB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA23WL IAA23WU IAA23WE IAA23WR to IAA32WL IAA32WU IAA32WE IAA32WR]**

*ELSE IF period amount covers = two weeks [IaP = 2]*

**IAFB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA23FL IAA23FU IAA23FE IAA23FR to IAA32FL IAA32FU IAA32FE IAA32FR]**

*ELSE IF period amount covers = four weeks, one month [IaP = 4, 5]*

**IAMB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA23ML IAA23MU IAA23ME IAA23MR to IAA32ML IAA32MU IAA32ME IAA32MR]**

*ELSE IF period amount covers = one year, lump sum [IaP = 52, 95]*

**IAYB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 3750, 5000, 7500)

**[Bracket results are recoded in IAA23YL IAA23YU IAA23YE IAA23YR to IAA32YL IAA32YU IAA32YE IAA32YR]**

ELSE

**IAOB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA23OL IAA23OU IAA23OE IAA23OR to IAA32OL IAA32OU IAA32OE IAA32OR]**

END OF FILTER

END OF FILTER

END OF LOOP

If receiving UC [IaBeN1 = yes]

**IAUC\***

You mention that [you / [^name] is/are] receiving Universal Credit at the moment. Were [you / [^name] assessed as having either a Limited Capability for Work or a Limited Capability for Work Related Activity. This usually applies to people with sickness or disability?"

INTERVIEWER: Press <F9> for more information

*F9 screen: "Claimants in ill health who claim Universal Credit are put into one of two groups: those with more severe disabilities are assessed as having a "limited capability for work related activity", while those with less severe disabilities are assessed as having a "limited capability for work". Those in the "limited capability for work" group are usually required to prepare for work, by, for example, writing a CV or undertaking training. Those assessed as having a "limited capability for work related activity" are not required to do any such activities."*

1. Limited Capability for Work
2. Limited Capability for Work Related Activity
3. I don't know but I get Universal Credit because of ill-health
4. Neither

END OF FILTER

END OF FILTER

*If person answering the IA module and agreed to proceed with the module*

*[IAAsk[PNo] = Yes) AND IaIntro = 1]*

**IABEPN\***

**SHOWCARD F2**

Which of these benefits is [^ your husband/wife/partner] receiving at the moment?

PROBE: What others? CODE ALL THAT APPLY.

[^BLANK / If respondent is aged 60 or over and says they are currently receiving Income Support or Minimum Income guarantee (MIG) explain that this benefit was replaced in October 2003 with Pension Credit.]

- 01 Universal Credit
- 02 Income Support
- 03 Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003)
- 04 Working Tax Credit (formerly part of Working Families Tax Credit)
- 05 Job-seeker's Allowance formerly Unemployment Benefit
- 06 Guardian's Allowance
- 07 Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance
- 08 Child Benefit
- 09 Child Tax Credit
- 95 Some other State Benefit (SPECIFY)
- 96 None of these

**[code maximum 9 out of 10 possible responses]**  
**Multiple responses to IABEPN are recoded in variables:**

Description	Variable	Archive
Universal Credit	iabepn1	iabepnuc
Income Support	iabepn2	iabepnis
Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003)	iabepn3	iabepnpc
Working Tax Credit (formerly part of Working Families Tax Credit)	iabepn4	iabepnwc
Job-seeker's Allowance formerly Unemployment Benefit	iabepn5	iabepnja
Guardian's Allowance	iabepn6	iabepnga
Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance	iabepn7	iabepnwp
Child Benefit	iabepn8	iabepncb
Child Tax Credit	iabepn9	iabepncc
Some other State Benefit (SPECIFY)	iabepn95	iabepn95
None of these	iabepn96	iabepn96

**[CHECK IA15] CHECK:** IF partner is over 60 and receives Income Support (or MIG) IF [IABEPN=2 AND (Partner's age>60)]  
**INTERVIEWER:** Income Support or MIG is not longer available to people aged 60 or over. This benefit was replaced with the Pension Credit. Please change!

**[CHECK IA16] CHECK:** IF selects "none of these" AND any other answer at IABEPN IF [IABEPN=96 AND (IABEPN = any 1 to 95)]  
**INTERVIEWER:** 'None' is an exclusive code at this question. Please change!

IF type of benefit partner receiving = other [IaBePN = 95]

**IABEPNO\***

INTERVIEWER: ENTER THE NAME OF THE OTHER BENEFIT.  
 STRING: 40

END OF FILTER

**[Open answers to IABEPNO are coded and where possible merged with the answers to IABEPN in variables: iabpnmuc iabpnmis iabpnmprc iabpnmtrc iabpnmja iabpnmga iabpnmwp iabpnmcb iabpnmcc iabpnmec iabpnm85 iabpnm86 iabpnm96]**

LOOP FOR EACH WORK AND INCOME BENEFIT PARTNER CURRENTLY RECEIVING

**IAP\***

How much did [^you / ^name] / [^your / ^name's]] [^husband / wife / partner]] [^BLANK / usually] receive from [^Income Support / Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003) / Working Tax Credit (formerly part of Working Families Tax Credit) / Job-seeker's Allowance formerly Unemployment Benefit / Guardian's Allowance / Widow's pension or Widowed mother's allowance or Widowed Parent's allowance or Bereavement allowance / Child Benefit / Child Tax Credit] [^BLANK / last time]?

INTERVIEWER: CODE PERIOD COVERED.

- 01 One week
- 02 Two weeks
- 03 Three weeks

04 Four weeks  
05 Calendar month  
07 Two Calendar months  
08 Eight times a year  
09 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)

**[Answers for each work or income benefit currently receiving (from IABEPN) are recoded in IAP33 to IAP42]**

*IF period amount covers = RESPONSE*  
*[IaP = RESPONSE]*

**IAA\***

INTERVIEWER: ENTER THE AMOUNT.

[^BLANK / If Don't Know amount because received with other benefits, enter total amount received here. Enter 9997 if amount already counted elsewhere.]

Range: 0..9997

**[Answers for each work or income benefit currently receiving (from IABEPN) are recoded in IAA33 to IAA42]**

END OF FILTER

*IF (period amount covers = DK, RF) OR (amount received = DK, RF)*  
*[(IaP = DK, RF) OR (IaA = DK, RF)]*

*IF period amount covers = one week*  
*[IaP = 1]*

**IAWB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

**[Bracket results are recoded in IAA33WL IAA33WU IAA33WE IAA33WR to IAA42WL IAA42WU IAA42WE IAA42WR]**

*ELSE IF period amount covers = two weeks [IaP = 2]*

**IAFB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

**[Bracket results are recoded in IAA33FL IAA33FU IAA33FE IAA33FR to IAA42FL IAA42FU IAA42FE IAA42FR]**

*ELSE IF period amount covers = four weeks, one month [IaP = 4, 5]*

**IAMB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA33ML IAA33MU IAA33ME IAA33MR to IAA42ML IAA42MU IAA42ME IAA42MR]**

ELSE IF period amount covers = one year, lump sum [IaP = 52, 95]

**IAYB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 3750, 5000, 7500)

**[Bracket results are recoded in IAA33YL IAA33YU IAA33YE IAA33YR to IAA42YL IAA42YU IAA42YE IAA42YR]**

ELSE

**IAOB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

**[Bracket results are recoded in IAA33OL IAA33OU IAA33OE IAA33OR to IAA42OL IAA42OU IAA42OE IAA42OR]**

END OF FILTER

END OF FILTER

END OF LOOP

If receiving UC [IaBePN1 = yes]

**IAUCP\***

You mention that [^your / his/her] [^husband / wife / partner] is receiving Universal Credit at the moment. Was [^your / his/her[^name's]] [^husband / wife / partner] assessed as having either a Limited Capability for Work or a Limited Capability for Work Related Activity. This usually applies to people with sickness or disability?"

INTERVIEWER: Press <F9> for more information

*F9 screen: "Claimants in ill health who claim Universal Credit are put into one of two groups: those with more severe disabilities are assessed as having a "limited capability for work related activity", while those with less severe disabilities are assessed as having a "limited capability for work". Those in the "limited capability for work" group are usually required to prepare for work, by, for example, writing a CV or undertaking training. Those assessed as having a "limited capability for work related activity" are not required to do any such activities."*

1. Limited Capability for Work
2. Limited Capability for Work Related Activity
3. I don't know but I get Universal Credit because of ill-health
4. Neither

END OF FILTER

END OF FILTER

*IF respondent for IA module and self/partner receive child benefit OR not respondent for IA module and married/cohabit and has children in HH under 20OR not respondent for IA module and not married/cohabit and receives child benefit*



[IAAsk[pnum] = Yes) AND ((IaBen = 8) OR (IaBePn = 8))) OR ((IAAsk[pnum] = No) AND ((Icouple[pnum] = married) OR (Icouple[pnum] = cohabit)) AND (IChinHHU[pnum] = Yes)) OR ((IAAsk[pnum] = No) AND ((Icouple[pnum] <> married) AND (Icouple[pnum] <> cohabit)) AND (IaBen = 8))

**IACBTX**

Can I check, [<sup>^</sup>dodoes[pnum] <sup>^</sup>youorhw[pnum]] pay a high income Child Benefit tax charge on the Child Benefit received for [<sup>^</sup>your/his/her] child?

[<sup>^</sup>INTERVIEWER: ONLY RECORD 1 'Yes' IF THIS RESPONDENT HIMSELF/HERSELF PAYS THE CHILD BENEFIT TAX CHARGE. RECORD 2 'No' IF IT IS THEIR PARTNER WHO PAYS THE CHILD BENEFIT TAX CHARGE ]

INTERVIEWER: ANSWER 'NO' IF RESPONDENT HAS DECIDED TO STOP RECEIVING CHILD BENEFIT OR CHILD IS NOT ELIGIBLE FOR CHILD BENEFIT.

Press <F9> for more information about the High Income Child Benefit charge

INTERVIEWER: Since January 2013 families where at least one parent earns £50,000 or more a year have had to pay a High Income Child Benefit charge on the CB they receive. This charge is paid through the tax system. Some families may have decided to stop receiving Child Benefit payments rather than repay the money through tax.

1 Yes

2 No

*IF pays a high income Child Benefit tax charge [IaCBTx = 1]*

**IACBTP**

Thinking of the High Income Child Benefit charge, what period did the last payment cover?

INTERVIEWER: THE CHILD BENEFIT TAX CHARGE MAY HAVE BEEN CALCULATED BY THE RESPONDENT ON THEIR LAST SELF-ASSESSMENT RETURN, IF THEY HAVE COMPLETED THEIR TAX RETURN. ALTERNATIVELY THEY MAY HAVE AN ESTIMATE OF THE LIABILITY FROM AN ONLINE CALCULATOR. MOST RESPONDENTS SHOULD BE ABLE TO PROVIDE AN ANNUAL AMOUNT.

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 provided a period for High Income Child Benefit tax charge [IaCBTP = RESPONSE]*

**IACBTA**

How much was the last payment?

INTERVIEWER: THE CHILD BENEFIT TAX CHARGE MAY HAVE BEEN CALCULATED BY THE RESPONDENT ON THEIR LAST SELF-ASSESSMENT RETURN, IF THEY HAVE COMPLETED THEIR TAX RETURN. ALTERNATIVELY THEY MAY HAVE AN ESTIMATE OF THE LIABILITY FROM AN ONLINE CALCULATOR. MOST RESPONDENTS SHOULD BE ABLE TO PROVIDE AN ANNUAL AMOUNT.

Range 0.01..9999.97

END OF FILTER

END OF FILTER

END OF FILTER

*IF (person's age >= 60) OR ((whether partner in household = yes) AND (DMAge >= 60))*

*[(IAgeOf >= 60) OR ((IAask = 1) AND (DMAge = >60))]*

**IAFUEL\***

Did [*^you / ^name*] [*^BLANK / or ^your / his / her*] [*^husband / wife / partner*] receive a Winter Fuel Payment in the last year (that is since [*^date a year ago*]?)

1 Yes

2 No

END OF FILTER

**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 / ^name*] [*^BLANK / or ^your / his / her*] [*^husband / wife / partner*] may have. [*^BLANK / Please include only savings and investments held in ^your / ^name's*] sole name.]

1 Press <1> and <Enter> to continue.

**IASI\***

**SHOWCARD F3**

Which, if any, of these savings and investments [*^do you / does ^name*] [*^BLANK / or ^your / his / her*] [*^husband / wife / partner*] have?

PROBE: What others?

INTERVIEWER: CODE TESSA-ONLY ISA (TOISA) AS ISA.

CODE ALL THAT APPLY.

01 Current Account at a bank, building society or elsewhere

02 Savings Account at a bank, building society or elsewhere

03 ISA (known as NISA from 2014)

04 Premium Bonds

05 National Savings Accounts or Certificates

06 Stocks and / or Shares

07 Share Options / Employee share ownership

08 Share clubs

09 Unit or Investment Trusts

10 Bonds and Gilts (government or corporate)

95 Other Savings or Investments

96 None of these

**[code maximum 13 out of 14 possible responses]**

Description	Archive
-------------	---------

Current Account at a bank, building society or elsewhere	lasica
Savings Account at a bank, building society or elsewhere	lasisav
ISA (known as NISA from 2014)	lasiisa
Premium Bonds	lasiipb
National Savings Accounts or Certificates	lasiins
Stocks and / or Shares	lasisha
Share Options / Employee share ownership	lasiopt
Share clubs	lasiisc
Unit or Investment Trusts	lasiuit
Bonds and Gilts (government or corporate)	lasibg
Other Savings or Investments	lasi95
None of these	lasi96

*[CHECK IA17] CHECK: IF selects "None of these AND any other response at IASI  
IF [IASI =96 AND (IASI =any 1 to 95]  
INTERVIEWER: 'None' is an exclusive code at this question. Please change!*

*IF savings and investments held = savings account, current account*

*[laSI = 1,2]*

**IASAVA\***

In total, how much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in [^your / his / her] [^current account(s) / savings account(s) / current and savings account(s)] (at the bank, building society or elsewhere)? [^BLANK / INTERVIEWER: IF CURRENT ACCOUNT IS OVERDRAWN, ENTER AMOUNT IN SAVINGS ACCOUNT ONLY. / INTERVIEWER: ENTER '0' IF OVERDRAWN.]

Range: 0..9999997

*[CHECK IA18] SIGNAL: IF amount of savings is greater than £300,000*

*IF IASAVA >300000*

*INTERVIEWER: Are you sure? £^laSava seems high - please check.*

*IF amount of savings = DK, RF*

*[laSava =DK,RF]*

**IASAVAB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 5000, 20000, 150000)

**[Bracket results are recoded in IASAVAL IASAVA IASAVAE IASAVAR]**

END OF FILTER

**IASINT\***

About how much interest did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from (this / these) account(s) in the last year after tax?

Range: 0..99997

*[CHECK IA19] SIGNAL: IF interest received from account(s) is greater than £15,000*

*IF IASINT>15000*

*INTERVIEWER: Are you sure? £^laSint seems high - please check.*

*IF interest received from accounts = DK, RF*

[IaSint = DK, RF]

**IASINTB\***

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (25, 100, 500, 7500)

**[Bracket results are recoded in IASINTL IASINTU IASINTE IASINTR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = ISA*

[IaSI = 3]

**IAISA\***

Which of the following [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in ISA(s) (known as NISA from 2014)...

INTERVIEWER: READ OUT.

CODE ALL THAT APPLY.

1 ... cash?

2 ... life insurance?

3 ... stocks and shares?

**[code maximum 3 out of 3 possible responses]**

Description	Variable	Archive
Cash	Ialsa1	Ialsa1
Life insurance	Ialsa2	Ialsa2
Stocks and shares	Ialsa3	Ialsa3

*IF type of ISA = cash*

[Ialsa = 1]

**IACISA\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] currently have in the cash components of ISA(s) (known as NISA FROM 2014) ?

Range: 0..999997

**[CHECK IA20] SIGNAL: IF amount in cash component of ISA is greater than £40,000**

**IF IACISA>40000**

**INTERVIEWER: Are you sure? £^IaCIsa seems high - please check.**

*IF amount in cash component of ISA =DK, RF*

[IaCIsa = DK, RF]

**IACISAB\***

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (5000, 10000, 15000, 20000)

**[Bracket results are recoded in IACISAL IACISAU IACISAE IACISAR]**

END OF FILTER

END OF FILTER

*IF type of ISA = life insurance*

*[Ialsa = 2]*

**IALISA\***

How much is the life-insurance component of [*^your / ^name's*] [*^BLANK / and*] [*^your / his / her*] [*^husband's / wife's / partner's*] ISA(s) (known as NISA from 2014) currently worth?

Range: 0..999997

*[CHECK IA21] SIGNAL: IF life-insurance component of ISA worth is worth more than £20,000*

*IF IALISA>20000*

*INTERVIEWER: Are you sure? £^IaLIsa seems high - please check.*

*IF how much life-insurance component of ISA worth = DK, RF*

*[IaLIsa = DK, RF]*

**IALISAB\***

Is it less than [*^amount*], more than [*^amount*] or what?

BRACKETS (2000, 4000, 7500, 10000)

***[Bracket results are recoded in IALISAL IALISAU IALISAE IALISAR]***

END OF FILTER

END OF FILTER

*IF type of ISA = stocks and shares*

*[Ialsa = 3]*

**IASISA\***

How much is the stocks and shares component of [*^your / ^name's*] [*^BLANK / and*] [*^your / his / her*] [*^husband's / wife's / partner's*] ISA(s) (known as NISA from 2014) currently worth?

Range: 0..999997

*[CHECK IA22] SIGNAL: IF How much stocks and shares component of ISA worth =RESPONSE [IaSIsa=RESPONSE]*

*CHECK: ("How much stocks and shares component of ISA worth" <= 100000)*

*[IaSIsa <= 100000]*

*INTERVIEWER: Are you sure? £^IaSIsa seems high - please check.*

*IF how much stocks and shares component of ISA worth = DK, RF*

*[IaSIsa = DK, RF]*

**IASISAB\***

Is it less than [*^amount*], more than [*^amount*] or what?

BRACKETS (5000, 10000, 25000, 50000)

***[Bracket results are recoded in IASISAL IASIAU IASISAE IASISAR]***

END OF FILTER

END OF FILTER

**IAISAD\***

Not including any income that was re-invested, about how much income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from (this / these) ISA(s) (known as NISA from 2014) in the last year?

Range: 0..99997

*[CHECK IA23] SIGNAL: IF amount of income received from ISA last year is greater than £4,000*

*IF IAISAD>4000*

*INTERVIEWER: Are you sure? £^laISAD seems high - please check.*

*IF amount of income received from ISA last year = DK, REF*

*[^laSaD =DK, RF]*

**IAISADB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 300, 2000)

*[Bracket results are recoded in IASADL IASADU IAISADE IAISDR]*

END OF FILTER

END OF FILTER

*IF savings and investments held = premium bonds*

*[^laSI = 4]*

**IANPB\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife /partner]] have in Premium Bonds?

Range: 0..9999997

*[CHECK IA24] CHECK: IF amount in Premium is greater than £10,000*

*IF [^laNPB > 10000]*

*EDITOR: 'Are you sure? ^lanPB seems high – please check'*

*IF amount in Premium Bonds = DK, RF*

*[^laNPB = DK, RF]*

**IANPBB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 500, 5000)

*[Bracket results are recoded in IANPBL IANPLBU IANPBE IANPBR]*

END OF FILTER

**IANPBP\***

How much prize income did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these bonds in the last year?

Range: 0..999997

*[CHECK IA25] SIGNAL: IF prize income received from these bonds is greater than £20,000*

*IF [^IANPBP>20000].*

*INTERVIEWER: Are you sure? £^lanPBP seems high - please check.*

IF prize income received from these bonds = DK, RF  
[!aNPBP = DK, RF]

**IAPBPB\***

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (50, 100, 1000, 10000)

**[Bracket results are recoded in IAPBPL IAPBPU IAPBPE IAPBPR]**

END OF FILTER

END OF FILTER

IF savings and investments held = national savings accounts  
[!aSI = 5]

**IANS\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in National Savings Accounts or Certificates?  
Range: 0..9999997

**[CHECK IA26] SIGNAL: IF amount of national savings is greater than £200,000  
IF [IANS>200000]  
"INTERVIEWER: Are you sure? £^!aNS seems high - please check."**

IF amount in National Savings Accounts or Certificates = DK, RF  
[!aNS = DK, RF]

**IANSB\***

Is it less than [^amount], more than [^amount] or what?  
BRACKETS (500, 2500, 10000, 100000)

**[Bracket results are recoded in IANSL IANSU IANSE IANSR]**

END OF FILTER

**IANSI\***

About how much interest did [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from these accounts or certificates in the last year after tax?  
Range: 0..99997

**[CHECK IA27] SIGNAL: IF interest received after tax is greater than £10,000  
IF IANSI>10000  
INTERVIEWER: Are you sure? £^!aNSi seems high - please check.**

IF interest received after tax = DK, RF  
[!aNSi = DK, RF]

**IANSIB\***

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (10, 50, 150, 5000)

**[Bracket results are recoded in IANSIL IANSIU IANSIE IANSIR]**

END OF FILTER

END OF FILTER

*IF IaSI = stocks and shares, share options, share clubs*

*[IaSI = 6, 7, 8]*

**IASSS\***

If [<sup>^</sup>you / <sup>^</sup>name]] chose to sell [<sup>^</sup>your / his / her] [<sup>^</sup>stocks and shares / share options / share club shares / stocks and shares and share options / stocks and shares and share club shares / share options and share club shares / stocks and shares, share options and share club shares] today, about how much would [<sup>^</sup>you / <sup>^</sup>name]] [<sup>^</sup>BLANK / and [<sup>^</sup>your / his / her] [<sup>^</sup>husband / wife / partner]] have?

Range: 0..9999997

*[CHECK IA28] SIGNAL: IF amount received if chose to sell is greater than £200,000*

*IF IASSS>200000*

*INTERVIEWER: Are you sure? £<sup>^</sup>IaSSS seems high - please check.*

*IF amount received if chose to sell = DK, RF*

*[IaSSS = DK, REF]*

**IASSSB\***

Would it be less than [<sup>^</sup>amount], more than [<sup>^</sup>amount] or what?

BRACKETS (1000, 2500, 10000, 100000)

***[Bracket results are recoded in IASSSL IASSSU IASSSE IASSSR]***

END OF FILTER

**IASSSI\***

About how much dividend income did [<sup>^</sup>you / <sup>^</sup>name]] [<sup>^</sup>BLANK / and [<sup>^</sup>your / his / her] [<sup>^</sup>husband / wife / partner]] receive from [<sup>^</sup>stocks and shares / share options / share club shares / stocks and shares and share options / stocks and shares and share club shares / share options and share club shares / stocks and shares, share options and share club shares] in the last year after tax?

Range: 0..999997

*[CHECK IA29] SIGNAL: IF dividend income received in last year is greater than £30,000*

*IF) [Iasssi > 30000]*

*INTERVIEWER: Are you sure? £<sup>^</sup>Iasssi seems high - please check.*

*IF dividend income received in last year = DK, RF*

*[IaSSSi = DK, RF]*

**IASSSIB\***

Was it less than [<sup>^</sup>amount], more than [<sup>^</sup>amount] or what?

BRACKETS (50, 150, 600, 15000)

***[Bracket results are recoded in variables IASSSIL IASSSIU IASSSIE IASSSIR]***

END OF FILTER

**IASHTYP\***

Which of the following types of shares [<sup>^</sup>do you / does [<sup>^</sup>name]] [<sup>^</sup>BLANK / and



[^your / his / her] [^husband / wife / partner]] have

INTERVIEWER: READ OUT. 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?

**[code maximum 4 out of 4 possible responses]**

Description	Variable	Archive
Shares in privatised industries (for example, British Telecom, British Gas or RailTrack)	iashtyp1	IASHTPRI
Shares in demutualised building societies or other mutual societies	iashtyp2	IASHMUT
Shares in other UK listed companies	iashtyp3	IASHTUKL
Shares in foreign listed companies	iashtyp4	IASHTFOL

*IF bought shares in privatised industries= yes AND whether bought shares at last interview = NA, DK, REF, EMPTY or NO*  
*[(Denat IN IaShTyp) and (FF\_iadenat = 9991, 9998, 9999, empty, or 3)]*

**IADENAT**

Did [^you / or your husband/wife] 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

END OF FILTER

*IF bought shares in demutualised building societies or other mutual societies AND whether bought shares at previous interview = NA, DK, REF, EMPTY or NO*  
*[(Demut IN IaShTyp) and (ff\_iademut = 9991, 9998, 9999, empty, or 3)]*

**IADEMUT**

Did [^you/ and your husband/wife] buy or receive any of these shares in demutualised building societies at the time they de-mutualised?

1 Yes - all of them

2 Yes - some of them

3 No - none of them

END OF FILTER

END OF FILTER

*IF savings and investments held = unit or investment trusts*

*[IaSI = 9]*

**IAUIT\***

IF [^you / ^name]] chose to sell [^you / ^name's]] Unit trusts or Investment trusts today, about how much would [^you / ^name]] [^BLANK / and [^you / his / her] [^husband / wife / partner]] have?

Range: 0..9999997

**[CHECK IA30] SIGNAL:** IF amount received If chose to sell greater than £400,000  
IF IAUIT> 400000  
INTERVIEWER: Are you sure? £^lauit seems high - please check.

IF amount received if chose to sell = DK, RF  
[lauit =DK, RF]

**IAUITB\***

Would it be less than [^amount], more than [^amount] or what?  
BRACKETS (5000, 10000, 50000, 200000)

**[Bracket results are recoded in IAUITL IAUITU IAUIE IAUITR]**

END OF FILTER

**IAUITI\***

Not including any income that was re-invested, about how much income did [^you /  
[^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from  
these Unit trusts or Investment trusts in the last year after tax?  
Range: 0..999997

**[CHECK IA31] SIGNAL:** IF income received from unit trusts or investments is greater  
than £20,000  
IF [IAUITI]>20000]  
INTERVIEWER: Are you sure? £^lauiti seems high - please check.

IF income received from unit trusts or investments = DK, RF  
[lauiti = DK, RF]

**IAUITIB\***

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (150, 500, 1250, 10000)

**[Bracket results are recoded in IAUITIL IAUITIU IAUITIE IAUITIR]**

END OF FILTER

END OF FILTER

IF savings and investments held = bonds and gilts  
[laSI = 10]

**IABG\***

If [^you / [^name]] chose to sell [^your / [^name's]] bonds and gilts today, about how  
much would [^you / [^name]] [^BLANK / and [^your / his / her] [^husband / wife /  
partner]] have?  
Range: 0..9999997

**[CHECK IA32] SIGNAL:** IF amount received If chose to sell is greater than £200,000  
IF [labg > 200000]  
INTERVIEWER: Are you sure? £^labg seems high - please check.

IF (amount received If chose to sell = DK, RF)  
[labg = DK, RF]

**IABGB\***

Would it be less than [^amount], more than [^amount] or what?  
BRACKETS (10000, 20000, 40000, 100000)

**[Bracket results are recoded in IABGL IABGU IABGE IABGR]**

END OF FILTER

**IABGI\***

About how much income did [^you / ^name] [^BLANK / and [^your/ his/ her] [^husband / wife/ partner]] receive from these Bonds and Gilts in the last year after tax?

Range: 0..999997

*[CHECK IA33] SIGNAL: IF income received from bonds and gilts =is greater than £100,000*

*IF [labgi > 100000]*

*INTERVIEWER: Are you sure? £^labgi seems high - please check.*

*IF income received from bonds and gilts = DK, RF*

*[labgi = DK, RF]*

**IABGIB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 300, 1000, 50000)

**[Bracket results are recoded in IABGIL IABGIU IABGIE IAGBIR]**

END OF FILTER

END OF FILTER

*IF savings and investments held = other*

*[laSI = 95]*

**IASIO\***

How much in total [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband / wife / partner]] have in other savings or investments?

Range: 0..9999997

*[CHECK IA34] SIGNAL: IF amount in other savings or investments is greater than £200,000*

*IF [laSio > 200000]*

*INTERVIEWER: Are you sure? £^laSio seems high - please check.*

*IF amount in other savings or investments = DK, RF*

*[laSloi = DK, RF]*

**IASIOB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 5000, 20000, 100000)

**[Bracket results are recoded in IASIOB IASIOU IASIOE IASIOR]**

END OF FILTER

**IASIOI\***

About how much interest did [**^you / ^name**] [**^BLANK / and ^your / his / her**] [**^husband / wife / partner**] receive from these other savings or investments in the last year after tax?

Range: 0..999997

**[CHECK IA35] SIGNAL:** IF amount received from other savings or investments is greater than £20,000

IF [**laSiOi > 20000**]

INTERVIEWER: Are you sure? £**^laSiOi** seems high - please check.

IF amount received from other savings or investments = DK, RF)

[**labSiOi = DK, RF**]

**IASIOIB\***

Was it less than [**^amount**], more than [**^amount**] or what?

BRACKETS (50, 150, 500, 10000)

**[Bracket results are recoded in IASIOIL IASIOIU IASIOIE IASIOIR]**

END OF FILTER

END OF FILTER

IF (savings and investments held = RESPONSE) AND NOT (savings and investments held = none) [(**laSI = RESPONSE**) AND NOT (**laSI = 96**)]

**IASICK\***

INTERVIEWER: Please check financial assets summary below:

[**^CURRENT AND SAVINGS ACCOUNTS : £.....**]

[**^ISA`S : £.....IN CASH, £.....IN LIFE INSURANCE, £.....IN STOCKS AND SHARE`S**]

[**^PREMIUM BONDS : £.....**]

[**^NATIONAL SAVINGS ACCOUNTS OR CERTIFICATES : £.....**]

[**^STOCKS AND SHARES, SHARE OPTIONS, SHARE CLUB SHARES : £.....**]

[**^UNIT TRUSTS : £.....**]

[**^BONDS AND GILTS : £.....**]

[**^OTHER SAVINGS OR INVESTMENTS : £.....**]

Go back and change any that are incorrect.

1 Press <1> and <Enter>to continue.

END OF FILTER

IF type of saving/investment<>shares in privatised industries AND bought shares at last interview = N/A, DK, REF, New partner, OR NO

[IF NOT(**DeNat IN laShtyp**) and (**ff\_jaden = 9991, 9998, 9999, empty or 2**)]

**IADEN**

Did [**^you/ or you husband/wife**] ever buy any shares when the nationalised industries (for example, British Telecom, British Gas or RailTrack) were privatised?

1 Yes

2 No

END OF FILTER

IF type of saving/investment<> shares in demutualised building societies AND ever received windfall shares at last interview = NA, DK, REF, New partner or NO

*[IF NOT(Demut IN IaShtyp) and (ff\_iadem 9991, 9998, 9999, empty or 2)]*

**IADEM**

Did [you^/ or you husband/wife] ever receive any windfall shares as a result of a demutualisation of a building society or other mutual institution?

- 1 Yes
- 2 No

END OF FILTER

**IALI\***

[^Do you / Does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] have any life insurance policies?

- 1 Yes
- 2 No

*IF whether has life insurance policies = yes*

*[IaLi = 1]*

*IF (whether partner in household = yes) AND (whether partner died less than 11 months ago <> yes) [(IAask = 1) AND (IDeadP12M <> 1)]*

**IALIW\***

Which of [^you / them] has life insurance policies?

- 1 Respondent only
- 2 Spouse / partner only
- 3 Both

END OF FILTER

*IF type of life insurance policies = respondent, both, EMPTY*

*[IaLiW = 1, 3, EMPTY]*

**IALIYA\***

How much would [^your / [^name's]] dependants get from [^your / his / her] life insurance policy or policies if [^you / [^name]] died?

Range: 0..9999997

*[CHECK IA36] SIGNAL: IF amount dependants would get from life-insurance is greater than £800,000*

*IF [IaLiYA > 800000]*

*INTERVIEWER: Are you sure? £^IaLiYA seems high - please check.*

*IF amount dependants would get from life-insurance policy = DK, RF*

*[IaLiYA = DK, RF]*

**IALIYAB\***

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (20000, 50000, 100000, 400000)

**[Bracket results are recoded in IALIYAL IALIYAU IALIYAE IALIYAR]**

END OF FILTER

END OF FILTER

*IF type of life insurance policies = spouse / partner, both*

[/aLiW = 2, 3]

**IALIPA\***

How much would [^your / his / her] [^husband's / wife's / partner's] dependants get from (his / her) life insurance policy or policies if [^he/she] died?

Range: 0..9999997

*[CHECK IA37] SIGNAL: IF amount dependents would receive from life insurance is greater than £800,000*

*IF [/aLipA > 800000]*

*INTERVIEWER: Are you sure? £^aLipA seems high - please check.*

*IF amount partner would get from life-insurance policy = DK, RF*

*[/aLipA =DK, RF]]*

**IALIPAB**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (20000, 50000, 100000, 400000)

**[Bracket results are recoded in IALIPAL IALIPAU IALIPAE IALIPAR]**

END OF FILTER

END OF FILTER

**IASC\***

Do any of [^your / ^name's] / [^your / ^name's]] and [^your / his / her] [^husband's / wife's / partner's] / [^your / his / her] [^husband's / wife's / partner's]] life insurance policy or policies have a savings component?

INTERVIEWER: That is the value of the fund will be paid at some point in the future.

1 Yes

2 No

*IF whether life insurance policies with savings component = yes*

*[/aSC = 1]*

**IASCA\***

About how much in total will [^this / these] savings component(s) yield when [^it / they] mature(s)?

Range: 0..9999997

*[CHECK IA38] SIGNAL: IF amount savings component(s) would yield is greater than £500,000*

*[/aSCA >500000]*

*INTERVIEWER: Are you sure? £^aSCA seems high - please check.*

*IF amount savings component(s) would yield = DK, RF*

*[/aSCA =DK, RF]]*

**IASCAB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 25000, 50000, 250000)

**[Bracket results are recoded in IASCAL IASCAU IASCAE IASCAR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (savings and investments held = RESPONSE) AND NOT (savings and investments held = none) [(laSI = RESPONSE) AND NOT (laSI = 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

END OF FILTER

**IAPROP\***

**SHOWCARD F4**

Which, if any, of these assets [*do you / does* *name*] [*BLANK / or* *your / his / her*] [*husband / wife / partner*] have, not including [*your / his / her / their*] own home?

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

**[code maximum 7 out of 8 possible responses]**

Description	Variable	Archive
Houses, flats or holiday homes, including timeshares (not including this home)	laprop1	lapropho
Farm or Business Property (such as a shop, warehouse or garage)	laprop2	lapropfa
Other land	laprop3	lapropol
Money owed to you by other	laprop4	lapropow
A trust	laprop5	laproptr
A covenant or inheritance	laprop6	lapropin
Other assets (including works of art or collectibles such as antiques or jewellery)	laprop95	laprop95
None of these	laprop96	laprop96

**[CHECK IA39] SIGNAL:** *IF selects "None of these" AND any other response at IAPROP*

*IF [IAPROP=96 AND (IAPROP = any 1 to 95)]*

*INTERVIEWER: 'None' is an exclusive code at this question. Please change*

IF assets owned = houses, flats or holiday homes [laprop = 1]

**IAHOME\***

IF [^you / ^name] chose to sell [^your / his / her] [^BLANK / other] house or holiday home and then paid off any debts on it, about how much would [^you / ^name] [^BLANK / and [^your / his / her] [^husband / wife / partner]] get?

Range: 0..999997

**[CHECK IA40] SIGNAL:** IF amount received if chose to sell is greater than £500,000

IF [IaHome > 500000]

INTERVIEWER: Are you sure? £^IaHome seems high - please check.

IF amount received if chose to sell = DK, RF [IaHome = DK, RF]

**IAHOMEB\***

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (10000, 50000, 100000, 250000)

**[Bracket results are recoded in IAHOME L IAHOME U IAHOME E IAHOME R]**

END OF FILTER

**IAIR\***

Did [^you / ^name] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive any income or rent from that property in the last year?

1 Yes

2 No

IF whether received any income or rent last year = yes

[Iair = 1]

**IAIRA\***

How much income or rent did [^you / ^name] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from that property in the last year, after any expenses and taxes?

Range: 0..999997

**[CHECK IA41] SIGNAL:** IF income or rent received from property last year is greater than £100,000

IF [IAira > 100000]

INTERVIEWER: Are you sure? £^IAira seems high - please check.

IF income or rent received from property last year = DK, RF

[Iaira = DK, RF]

**IAIRB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 7500, 50000)

**[Bracket results are recoded in IAIRA L IAIRA U IAIRA E IAIRA R]**

END OF FILTER

END OF FILTER

END OF FILTER

IF assets owned = farm or business property



[/laprop = 2]

**IAFBPS\***

If [^you / ^name] sold [^your / his / her] Farm or Business property and then paid off any debts on it, about how much would [^you / ^name] [^BLANK / and [^your / his / her] [^husband / wife / partner]] get?

Range: 0..9999997

*[CHECK IA42] SIGNAL: IF amount received if sold Farm or Business property is greater than £1,000,000*

*IF[/afbps > 1000000]*

*INTERVIEWER: Are you sure? £^afbps seems high - please check.*

*IF amount received if sold Farm or Business property = DK, RF*

*[(/afbps = DK, RF)]*

**IAFBPSB\***

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (10000, 50000, 100000, 500000)

**[Bracket results are recoded in IAFBPSL IAFBPSU IAFBPSE IAFBPSR]**

END OF FILTER

**IAFBPR\***

Did [^you / ^name] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive any income or rent from that property in the last year?

1 Yes

2 No

*IF whether income or rent received in last year = yes*

*[/afbpr = 1]*

**IAFBA\***

How much income or rent did [^you / ^name] [^BLANK / and [^your / his / her] [^husband / wife / partner]] receive from that property in the last year, after any expenses and taxes?

Range: 0..999997

*[CHECK IA43] SIGNAL: IF income received from property in last year is greater than £100,000*

*[/IAfbA > 100000]*

*INTERVIEWER: Are you sure? £^IAfbA seems high - please check.*

*IF income received from property in last year = DK,RF*

*[/lafBA = DK, RF]*

**IAFBAB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 7500, 50000)

**[Bracket results are recoded in IAFBAL IAFBPAU IAFBP AE IAFBPAR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF assets owned = other land, money owed by others, a trust, a covenant or inheritance, other assets [laprop = 3, 4, 5, 6, 95]*

**IAOASA\***

How much is [*^the other land / the money owed to [^you/name] by others / the trust / the covenant or inheritance / the other land and the money owed to [^you/name] by others / the other land and the trust / the other land and the covenant or inheritance etc.*] worth?

Range: 0..9999997

*[CHECK IA44] SIGNAL: IF amount it is worth is greater than £200,000*

*IF [laOasA >200000]*

*INTERVIEWER: Are you sure? £<sup>^</sup>laOasA seems high - please check.*

*IF amount it is worth = DK, RF*

*[laOasA = DK, RF]*

**IAOASAB\***

Would it be less than [*^amount*], more than [*^amount*] or what?

BRACKETS (5000, 7500, 20000, 100000)

**[Bracket results are recoded in IAOASAL IAOASAU IAOASAE IAOASAR]**

END OF FILTER

END OF FILTER

**IAREGP\***

Apart from anything you have already told me about, did [*^you / ^name*] receive any regular payments from people not living here in the past year (that is since [*^date a year ago*])?

1 Yes

2 No

*IF whether regular payments from people outside household in past year = yes*

*[laregp = 1]*

*LOOP FOR UP TO FOUR PAYMENTS*

*IF (payment = 1) OR (whether received other regular payments = yes)*

*[(k = 1) OR (laOthP = 1)]*

**IAPAY\***

Thinking about [*^your / ^name's*] [*^first / second / third / next*] payment who was it from?

01 Husband / Wife

02 Ex-husband / wife / partner

03 Son / Daughter

04 Son / Daughter-in-law

05 Parent

06 Parent-in-law

07 Brother / Sister

08 Brother / Sister-in-law

09 Grandchild

10 Other relative

11 Other non-relative

12 Local Authority

13 Publisher

**[Responses for loops two to four are recoded in IAPAY2 to IAPAY4]**

**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
- 7 Payment from solar panels (feed-in tariff)
- 95 Other (specify)

**[Responses for loops two to four are recoded in IAPAYR2 to IAPAYR4]**

*IF reason for payment = other*

*[lapayr = 95]*

**IAPAYO\***

INTERVIEWER: Enter other reason.

String 60

**[Open responses to IAPAYO were coded and then incorporated into IAPAYR.]**

END OF FILTER

**IAREGO\***

What period did [*^your / ^name's*] usual payments cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 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)

**[Responses for loops two to four are recoded in IAREGO2 to IAREGO4]**

*IF periods payments covered = RESPONSE*

*[larego = RESPONSE]*

**IAREGM\***

And about how much did [*^you / ^name*] usually receive?

Range: 0..9999997

**[Responses for loops two to four are recoded in IAREGM2 to IAREGM4]**

**[CHECK IA45] SIGNAL:** IF amount usually received is greater than £4000 per week OR greater than £8,000 every two weeks OR greater than £16,000 every four weeks or calendar month OR greater than £200,000 for every other time period

IF [(IAREGO=1 AND IAREGM>4000) OR (IAREGO=2 AND IAREGM >8000) OR (IAREGO= 4 or 5 AND IAREGM>16000) OR (IAREGO =3, 7 thru 95 AND IAREGM>200 000)]

INTERVIEWER: Are you sure? £^IaRegm seems high - please check.

END OF FILTER

IF (periods payments covered = DK, RF) OR (amount usually received = DK, RF) [(Iarego = DK, RF) OR (Iaregm = DK, RF)]

IF periods payments covered = one week [Iarego = 1]

**IAREGMWB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (25, 50, 100, 2000)

**[Bracket results are recoded in IARGWL IARGWU IARGWE IARGWR to IARG4WL IARG4WU IARG4WE IARG4WR]**

ELSE IF periods payments covered = two weeks [Iarego = 2]

**IAREGMFB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 100, 200, 4000)

**[Bracket results are recoded in in IARGFL IARGFU IARGFE IARGFR to IARG4FL IARG4FU IARG4FE IARG4FR]**

ELSE IF periods payments covered = four weeks, one month [Iarego = 4, 5]

**IAREGMMB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in in IARGML IARGMU IARGME IARGMR to IARG4ML IARG4MU IARG4ME IARG4MR]**

ELSE IF periods payments covered = one year, lump sum [Iarego = 52, 95]

**IAREGMYB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1250, 2500, 5000, 100000)

**[Bracket results are recoded in in IARGYL IARGYU IARGYE IARGYR to IARG4YL IARG4YU IARG4YE IARG4YR]**

ELSE

**IAREGMOB\***

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in in IARGOL IARGOU IARGOE IARGOR to IARG40L IARG40U IARG40E IARG40R]**

END OF FILTER

END OF FILTER

**IAOTHP\***

Did [^you / ^name] receive any other regular payments from people not living here in the past year?

- 1 Yes
- 2 No

**[Responses for loops two to four are recoded in IAOTHP2 to IAOTHP4]**

END OF FILTER

END OF LOOP

END OF FILTER

*IF (whether partner in household = yes) AND (continued with module IA = continued)*  
*[(IAask = 1) AND (IAIntro = 1)]*

**IAPAR\***

Apart from anything you have already told me about, did [^you/ ^ name] (or) / [^your / his / her] [^husband / wife / partner] receive any regular payments from people not living here in the past year (that is since [^date a year ago])?

- 1 Yes
- 2 No

*IF whether received other regular payments = yes*  
*[lapar = 1]*

**LOOP FOR UP TO FOUR PAYMENTS**

*IF (payment = 1) OR (whether received other regular payments from outside household in last year = yes)*  
*[(k = 1) OR (laMrP = 1)]*

**IAPS\***

Thinking about [^your/ ^ name]'s (or) / [^your / his / her] [^husband / wife / partner]'s payment who was it from?

- 01 Husband / Wife
- 02 Ex-husband / wife / partner
- 03 Son / Daughter
- 04 Son / Daughter-in-law
- 05 Parent
- 06 Parent-in-law
- 07 Brother / Sister
- 08 Brother / Sister-in-law
- 09 Grandchild
- 10 Other relative

- 11 Other non-relative
- 12 Local authority
- 13 Publisher

***[Responses for loops two to four are recoded in IAPS2 to IAPS4]***

**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)

***[Responses for loops two to four are recoded in IAPR2 to IAPR4]***

*IF reason for payment = other*

| *[IaPR = 95]*

**IAPARO\***

INTERVIEWER: Enter other reason.

String 60

***[Open responses to IAPARO were coded and then incorporated into IAPR.]***

END OF FILTER

**IAPF\***

What period did [*^your/ ^ name's (or) / ^your / his / her*] [*^husband / wife / partner's*] usual payments cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 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)

***[Responses for loops two to four are recoded in IAPF2 to IAPF4]***

*IF period usual payments covered = RESPONSE*

| *[Iapf = RESPONSE]*

**IAPAM2\***

And about how much did [*^your/ ^ name's (or) / ^your / his / her*] [*^husband /*

wife / partner]'s] usually receive?

Range: 0..999997

**[Responses for loops two to four are recoded in IAPAM3 to IAPAM5]**

END OF FILTER

*IF (period usual payments covered = DK, RF) OR (state pension amount = DK, RF)*

*[(lapf = DK, RF) OR (lapam = DK, RF)]*

*IF period usual payments covered = one week*

*[lapf = 1]*

**IAPWB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (25, 50, 100, 2000)

**[Bracket results are recoded in IAPA2WL IAPA2WU IAPA2WE IAPA2WR to IAPA5WL IAPA5WU IAPA5WE IAPA5WR]**

*ELSE IF period usual payments covered = two weeks [lapf = 2]*

**IAPFB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 100, 200, 4000)

**[Bracket results are recoded in IAPA2FL IAPA2FU IAPA2FE IAPA2FR to IAPA5FL IAPA5FU IAPA5FE IAPA5FR]**

*ELSE IF period usual payments covered = four weeks, one month [lapf = 4, 5]*

**IAPMB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in IAPA2ML IAPA2MU IAPA2ME IAPA2MR to IAPA5ML IAPA5MU IAPA5ME IAPA5MR]**

*ELSE IF period usual payments covered = one year, lump sum [lapf = 52, 95]*

**IAPYB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1250, 2500, 5000, 100000)

**[Bracket results are recoded in IAPA2YL IAPA2YU IAPA2YE IAPA2YR to IAPA5YL IAPA5YU IAPA5YE IAPA5YR]**

ELSE

**IAPOB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 400, 8000)

**[Bracket results are recoded in IAPA2OL IAPA2OU IAPA2OE IAPA2OR to IAPA5OL IAPA5OU IAPA5OE IAPA5OR]**

END OF FILTER

END OF FILTER

**IAMRP\***

Did [^you/ [^ name] (or) / [^you / his / her] [^husband / wife / partner]] receive

any other regular payments from people not living here in the past year?

1 Yes

2 No

**[Responses for loops two to four are recoded in IAMRP2 to IARMP4]**

END OF FILTER

END OF FILTER

END OF LOOP

END OF FILTER

#### **IAPK\***

#### **SHOWCARD F5**

Which, if any, of these payments and payments in kind [<sup>^</sup>did / have / has] [<sup>^</sup>your / his / her] [<sup>^</sup>husband / wife / partner] / [<sup>^</sup>partner's name] / [<sup>^</sup>you / <sup>^</sup>name]] or [<sup>^</sup>partner's name] [<sup>^</sup>receive / received] [<sup>^</sup>in the last two years/ since the last interview, that is since [<sup>^</sup>last interview date]]?

PROBE: What others?

CODE ALL THAT APPLY.

1 Life insurance policy

2 Lump sum pension payout

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

8 Substantial gift of money or in kind; that is one exceeding £1000

95 Other payment (SPECIFY)

96 None of these

**[code maximum 8 out of 9 possible responses]**

Description	Variable	Archive
Life insurance policy	lapk1	lapkli
Lump sum pension payout	lapk2	lapkpp
Personal Accident plan	lapk3	lapkpap
Other insurance payment	lapk4	lapkoip
Redundancy payment	lapk5	lapkrp
Inheritance or bequest (inc. inherited property)	lapk6	lapkiob
Win(s) on the football pools, national lottery or other form of gambling	lapk7	lapkgw
Substantial gift of money or in kind; that is one exceeding £1000	lapk8	lapksg
Other payment (specify)	lapk95	lapk95
None of these	lapk96	lapk96

**[CHECK IA46] CHECK:** IF selects "None of these AND any other response at IAPK

IF [IAPK= 96 AND IAPK= any 1 to 95]

'None' is an exclusive code at this question. Please change!

IF (payments received in last year = other) AND (whether post-interview editing question <> yes OR (payments received in last year = [EMPTY, other]))



[(lapk = 95) AND (EditQre <> 1 OR (lapkz = [EMPTY, 95]))]

**IAPKO\***

INTERVIEWER: Write in source of other payment.

String 20

END OF FILTER

**Open responses to IAPKO are coded and where possible merged with the multiple responses to IAPK in variables:**

Description	Variable	Archive
Life insurance policy	lapkzm1	lapkmli
Lump sum pension payout	lapkzm2	lapkmpp
Personal Accident plan	lapkzm3	lapkpmap
Other insurance payment	lapkzm4	lapkomip
Redundancy payment	lapkzm5	lapkmp
Inheritance or bequest (inc. inherited property)	lapkzm6	lapkimob
Win(s) on the football pools, national lottery or other form of gambling	lapkzm7	lapkmgw
Substantial gift of money or in kind; that is one exceeding £1000	lapkzm8	lapkmsg
PPI mis-selling compensation payment	lapkzm9	lapkmppi
Other answer - not codeable 01 to 08	lapkzm85	laokm85
Irrelevant response - not codeable 01 to 08	lapkzm85	laokm86
None of these	lapkzm96	lapkm96

**[CHECK IA47] CHECK:** IF selects "None of these" AND any other response at IAPKO  
IF [IAPKO=96 AND IAPKO= Any 1 to 95]

**EDITOR:** 'None' is an exclusive code at this question. Please change!

IF (payments received in last year = RESPONSE) AND NOT (payments received in last year = none) [(lapk = RESPONSE) AND NOT (lapk = 96)]

LOOP FOR n:= 1 TO 9

IF payments received in last year = n95loop

[lapk = n95loop]

(Questions below are repeated for every payment reported in IAPK)

**IAPKM\***

How much in total did [^you / ^name] [^BLANK / and [^your / his / her] [^husband / wife / partner]] [^receive from the [^Life insurance policy / lump sum pension payout / Personal Accident Plan / other insurance payment / redundancy payment / inheritance or bequest / win on the football pools, national lottery or other form of gambling / substantial gift of money / other payment] /]?

Range: 0..999997

**Responses for each payment received (at IAPK) are recoded in variables:**

Description	Variable	Archive
Amount received from life insurance policy	iapkm1	iapkm1
Amount received from lump sum pension payout	iapkm2	iapkm2
Amount received from personal accident plan	iapkm3	iapkm3
Amount received from other insurance payment	iapkm4	iapkm4
Amount received from redundancy payment	iapkm5	iapkm5

Amount received from inheritance or bequest	iapkm6	iapkm6
Amount won on football pools, national lottery or other form of gambling	iapkm7	iapkm7
Amount received from substantial gift	iapkm8	iapkm8
Amount received from other lump sum payment	iapkm9	iapkm9

*IF (payment received in total = DK, RF)  
[lapkm = DK, RF]*

**IAPKMB\***

Was it less than [^amount], more than [^amount] or what?  
BRACKETS (2500, 5000, 15000, 50000)

**[Bracket results are recoded in IAPKM1L IAPKM1U IAPKM1E IAPKM1R TO IAPKM8L IAPKM8U IAPKM8E IAPKM8R]**

END OF FILTER

END OF FILTER

END OF LOOP

END OF FILTER

**IADEBT\***

I would like to ask you about any other financial commitments [^you / ^name] [^BLANK / or [^your / his / her] [^husband / wife / partner]] may have apart from mortgages or housing related loans. [^Do you / Does [^name] [^BLANK / or [^your / his / her] [^husband / wife / partner]] currently owe any money on credit or store cards?  
INTERVIEWER: Record No if respondent pays off the balance on their credit or store cards each month.

1 Yes

2 No

*IF whether owes money on credit or store cards = yes  
[ladebt = 1]*

**IADEBM\***

How much was the outstanding balance on these cards after the last monthly payment was made?

Range: 0..99997

*[CHECK IA48] CHECK: IF amount of outstanding balance on cards is £0 AND currently owns money on credit /store cards*

*IF [IADEBT=1 AND IADEBM=0]*

*"EDIT: laDeb=0 Please change laDebt to 'no' (code 2)"*

*[CHECK IA49] SIGNAL: IF amount of outstanding balance on cards is greater than £50,000*

*[ladebm > 50000]*

*INTERVIEWER: Are you sure? £^ladebm seems high - please check.*

*IF amount of outstanding balance on cards = DK, RF*

*[ladebm = DK, RF]*

**IADEBMB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)  
**[Bracket results are recoded in IADEBMBL IADEBMBU IADEBMBE  
IADEBMBR]**

END OF FILTER

END OF FILTER

**IAOWE\***

[^Do you / Does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]]  
currently owe any money to friends, relatives, or other private individuals?

1 Yes

2 No

*IF whether currently owes money to someone = yes*

[laowe = 1]

**IAOWEM\***

How much [^do you / does [^name]] [^BLANK / and [^your / his / her] [^husband /  
wife / partner]] owe?

Range: 0..99997

*[CHECK IA50] SIGNAL: IF amount owed is greater than £50,000*

*IF [laowem > 50000]*

*INTERVIEWER: Are you sure? £^laowem seems high - please check.*

*IF amount owed = DK, RF*

[laowem = DK, RF]

**IAOWETB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)

**[Bracket results are recoded in IAOWEML IAOWEMU IAOWEME IAOWEMR]**

END OF FILTER

**IAREGR\***

[^Do you / Does [^name]] [^BLANK / and [^your / his / her] [^husband / wife /  
partner]] make regular repayments on these loans?

1 Yes

2 No

*IF whether makes regular payments on these loans = yes*

[laRegR = 1]

**IAREGRP\***

What period do these repayments cover?

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two Calendar months

08 Eight times a year

09 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 repayments cover = RESPONSE*  
[*laRegRP = RESPONSE*]

**IAREP\***

How much are [*^your / ^name's*] usual repayments?  
Range: 0..9997

*[CHECK IA51] SIGNAL: IF amount of usual repayments is greater than £300 per week OR greater than £600 every two weeks, OR greater than £1200 every four weeks/calendar month OR greater than £15,000 for any other time period.*  
*IF[ (IAREGRP = 1 AND IAREP>300) OR (IAREGRP=2 AND IAREP>600) OR (IAREGRP=4 or 5 AND IAREP>1200 OR IAREGRP=3, 7 thru 95 AND IAREP>15000)]*  
*INTERVIEWER: Are you sure? £^larep seems high - please check.*

END OF FILTER

*IF (period repayments cover = DK, RF) OR (amount of usual repayments = DK, RF)*  
*[[laRegRP = DK, RF) OR (larep = DK, RF)]*

*IF period repayments cover = one week*  
*[laRegRP = 1]*

**IARPWB\***

Is it less than [*^amount*], more than [*^amount*] or what?  
BRACKETS (10, 20, 50, 150)

**[Bracket results are recoded in IAREPWL IAREPWU IAREPWE IAREPWR]**

*ELSE IF period repayments cover = two weeks*  
*[laRegRP = 2]*

**IARPFB\***

Is it less than [*^amount*], more than [*^amount*] or what?  
BRACKETS (20, 40, 100, 300)

**[Bracket results are recoded in IAREPFL IAREPFU IAREPFE IAREPFR]**

*ELSE IF period repayments cover = four weeks, one month*  
*[laRegRP = 4, 5]*

**IARPMB\***

Is it less than [*^amount*], more than [*^amount*] or what?  
BRACKETS (40, 80, 200, 600)

**[Bracket results are recoded in IAREPML IAREPMU IAREPME IAREPMR]**

*ELSE IF period repayments cover = one year, lump sum [laRegRP = 52, 95]*

**IARPYB\***

```

| | | Is it less than [^amount], more than [^amount] or what?
| | | BRACKETS (500, 1000, 2500, 7500)
| | |
| | | [Bracket results are recoded in IAREPYL IAREPYU IAREPYE IAREPYR]
| | |
| | | ELSE
| | |
| | | IARPOB*
| | | Is it less than [^amount], more than [^amount] or what?
| | | BRACKETS (40, 80, 200, 600)
| | |
| | | [Bracket results are recoded in IAREPOL IAREPOU IAREPOE IAREPFOR]
| | |
| | | END OF FILTER
| | |
| | | END OF FILTER
| | |
| | | END OF FILTER
| | |
| | | END OF FILTER

```

**IALOAN\***

**SHOWCARD F6**

On which, if any, of these [^do you / does [^name]] [^BLANK / or [^your / his / her] [^husband / wife / partner]] currently owe money?

PROBE: What others? CODE ALL THAT APPLY.

- 1 Hire purchase agreements
- 2 Personal loans (from bank, building society or other financial institution)
- 3 Overdraft
- 4 Catalogue or mail order purchase agreements
- 5 DWP social fund loan
- 6 Loan from a money lender or 'tally man'
- 96 None of these

**[code maximum 6 out of 7 possible responses]**

Description	Variable	Archive
Hire purchase agreements	ialoan1	ialoanhp
Personal loans (from bank, building society or other financial institution)	ialoan2	ialoanpl
Overdraft	ialoan3	ialoanod
Catalogue or mail order purchase agreements	ialoan4	ialoanmo
DWP social fund loan	ialoan5	ialoansf
Loan from a money lender or 'tally man'	ialoan6	ialoanml
None of these	ialoan96	ialoan96

**[CHECK IA52] CHECK: IF owes money on following = none [ialoan=96]**  
**CHECK: (CARDINAL("owes money on following")=1) [CARDINAL(ialoan)=1]**  
*'None' is an exclusive code. Please change!*

**IF (owes money on following = RESPONSE) AND NOT (owes money on following = none)**

```

| | | [(ialoan = RESPONSE) AND NOT (ialoan = 96)]

```

**IALOAM\***

How much in total [^do you / does [^name]] [^BLANK / and [^your / his / her]

[^husband / wife / partner]] owe on these loans?

Range: 0..99997

**[CHECK IA53] SIGNAL:** IF total amount owed on loans is greater than £50,000

IF [laloam > 50000]

INTERVIEWER: Are you sure? £^laloam seems high - please check.

IF (total amount owed on loans = DK, RF)

[laloam = DK, RF]

**IALOAMB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)

**[Bracket results are recoded in IALOAML IALOANMU IALOANME IALOANMR]**

END OF FILTER

IF NOT ((laloan.CARDINAL = 1) AND (owes money on following = overdraft))

[NOT ((laloan.CARDINAL = 1) AND (laloan = 3))]

**IALREP\***

What period [^do / does] [^your / ^name's]] [^BLANK / and [^your / his / her] [^husband's / wife's / partner's]] usual repayments on these loans cover?

INTERVIEWER: If doesn't make repayments, code 97.

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two Calendar months

08 Eight times a year

09 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 (periods usual repayments cover = RESPONSE) AND (periods usual repayments cover = doesn't make repayments)

[(lalnreP = RESPONSE) AND (lalnreP = 97)]

**IALRE\***

How much [^are / is] [^your / ^name's]] usual repayments on these loans?

Range: 0..99997

**[CHECK IA54] SIGNAL:** IF amount of usual repayments is greater than £300 per week OR greater than £600 every two weeks, OR greater than £1200 every four weeks/calendar month OR greater than £15,000 for any other time period.

IF[ (IALREP =1 AND IALRE>300) OR (IALREP=2 AND IALRE>600) OR  
(IALREP=4 or 5 AND IALRE>1200 OR IALREP=3, 7 thru 95 AND  
IALRE>15000)]

*INTERVIEWER: Are you sure? £^IALRE seems high - please check.*

END OF FILTER

*IF (periods usual repayments cover = DK, RF) OR (amount of usual repayments on  
loans = DK, RF)*

*[(lalreP = DK, RF) OR (lalre = DK, RF)]*

*IF period usual repayments cover = one week*

*[lalreP = 1]*

**IALRPWB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10, 20, 50, 150)

**[Bracket results are recoded in IALREWU IALREWE IALREWR]**

*ELSE IF period usual repayments cover = two weeks [lalreP = 2]*

**IALRPFB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (20, 40, 100, 300)

**[Bracket results are recoded in IALREFU IALREFE IALREFLR]**

*ELSE IF period usual repayments cover = four weeks, one month [lalreP = 4, 5]*

**IALRPMB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (40, 80, 200, 600)

**[Bracket results are recoded in IALREML IALREMU IALREME IALREFMR]**

*ELSE IF period usual repayments cover = one year, lump sum [lalreP = 52, 95]*

**IALRPYB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (500, 1000, 2500, 7500)

**[Bracket results are recoded in IALREYL IALREYU IALREYE IALREYR]**

*ELSE*

**IALRPOB\***

Is it less than [^amount], more than [^amount] or what?

BRACKETS (40, 80, 200, 600)

**[Bracket results are recoded in IALREOL IALREOU IALREOE IALREOR]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

IF whether there is a couple in the household>0

[!CoupleN > 0]

**IAJNT\***

Can I just check, [^do you / does [^name]] have any savings, investments, property or other assets that are held jointly with [^your / [^name's]] [^husband / wife / partner]?

1 Yes

2 No

IF whether holds assets jointly with partner = yes

[!aJnt = 1]

**IAAM\***

About how much would [^your / [^name's]] personal share amount to, minus share of any joint debts [^you and your / [^name] and [^name's]] [^husband / wife / partner] might have?

Range: 0..999997

**[CHECK IA55] SIGNAL: IF amount of personal share is greater than £100,000**

IF [!aAm > 100000]

INTERVIEWER: Are you sure? £^!aAm seems high - please check.

IF amount of personal share = DK, RF

[!aAm = DK, RF]

**IAAMB\***

Would it amount to less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2500, 10000, 50000)

**[Bracket results are recoded in IAAML IAAMU IAAME IAAMLR]**

END OF FILTER

END OF FILTER

END OF FILTER

IF ever received an inheritance at previous interview = NA, DK, REF, New Partner OR NO

[!F (FF\_jai <> 9991, 9998, 9999 , empty, OR 2)]

**IAIGI\***

We are interested in any gifts and inheritances [[^you/name] [^and/or] [[^husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]]] may have received over [^your/his/her] lifetime.

First we will ask about inheritances and then we will ask separately about gifts

[^you/he/she] may have received.

INTERVIEWER ONLY IF NECESSARY: An inheritance is received after the death of the giver. Gifts are received during the giver's lifetime.

Press <1> and <Enter> to continue

END OF FILTER

IF ever received an inheritance not answered previously OR ever received any substantial gifts = NA , DK, REF, New Partner or NO



[(FF\_iai = 9991, 9998, 9999, empty or 2) OR (ff\_iag <> RESPONSE)]

**IAI\***

[^Have/has [^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]]] ever received an inheritance or been given substantial assets in the form of a trust?

INTERVIEWER NOTE: Please do include inheritances already mentioned at IAPk

INTERVIEWER NOTE: Do not include inheritances given directly to the respondent's children

01 Yes

02 No

END OF FILTER

*IF received an inheritance = yes*

[|al = 1]

**IAIN\***

How many such inheritances or trusts [^have/has] [[^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]]] received in total?

ENTER NUMBER

RANGE: 1..97

*LOOP UP TO 3 TIMES*

*IF couple with joint finances = yes*

[|AAsk = 1]

**IAIWH\***

Thinking about the [^largest/next largest] inheritance or trust, was [[^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]]] who received this, or was it given to both jointly?

INTERVIEWER: IF INHERITANCE WAS RECEIVED JOINTLY WITH A FORMER HUSBAND/WIFE/PARTNER THEN THE CORRECT ANSWER IS RESPONDENT

01 [^respondent's name]

02 [^husband/wife/partner's name]

03 Both/jointly

*ELSEIF not joint finances and in a couple [(|AAsk = 2) AND (|couplen[pnum]>0)]*

**IAIJ\***

Thinking about the [^largest/next largest] inheritance or trust, was this inheritance received by [[^you/name] alone or jointly with [^husband/wife/partner's name]?

01 just [^respondent's name]

02 jointly with [^husband/wife/partner's name]

END OF FILTER

**IAIWN\***

[^Thinking about the [^largest/next largest] inheritance or trust, when/ When] did [[^you/name] [^and/or] [[husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]]] receive this inheritance?

INTERVIEWER SELECT WHETHER ANSWER GIVEN AS YEAR OR AGE

01 Year

02 Age

IF when received inheritance = year [laiwn =1]

**IAIY\***

ENTER YEAR

INTERVIEWER NOTE: Please enter approximate date or mid-point of a decade if the respondent is uncertain.

RANGE: 1900..2020

*[CHECK IA56] CHECK: IF date received inheritance is later than interview date  
If [iaiy > IIntDat.Year]  
This is in the future. Please change.*

ELSEIF when received inheritance = Age [laiwn = 2]

**IAIAG\***

ENTER AGE WHEN INHERITANCE RECEIVED

ENTER AGE OF THE PERSON RECEIVING THE INHERITANCE AT THE TIME THEY RECEIVED IT.

INTERVIEWER NOTE: if the respondent received it jointly with their partner, they should give us the AGE that THE RESPONDENT WAS when he or she received the inheritance.

INTERVIEWER NOTE: Please enter approximate age or mid-point of a decade if the respondent is uncertain.

RANGE : 0..120

*[CHECK IA57] CHECK: IF age received inheritance is older than the current age  
IF iaiaag>IPartAge  
This is older than the respondent's partner/spouse's current age of ^IPartAge.  
Please change.*

END OF FILTER

**IAIWM\***

From whom did [[^you/name] [^and/or] [[husband/wife/partner's name]/  
[^your/his/her] [^husband/wife/partner]] receive this inheritance or trust?

INTERVIEWER NOTE: This inheritance was received JOINTLY with the respondent's spouse/partner, please record the relationship to the RESPONDENT/  
This inheritance was received by the respondent's spouse/partner.

Please record the relationship of the donor to the SPOUSE/PARTNER

- 01 Grandparent
- 02 Parent
- 03 Parent-in-law
- 04 Child
- 05 Aunt/uncle
- 06 Respondent's sibling
- 07 Husband/wife/partner's sibling
- 08 Husband/wife/partner/ex-spouse
- 09 Other relative
- 10 Non-relative
- 95 Other
- 96 None of these

*IF relationship of inheritance donor = other*  
[*laiwm=11*]

**IAIWMX\***

Enter other response

END OF FILTER

**IAIV\***

What was [*^your/his/her share of*] the value of this inheritance or trust at the time that [[*^you/name*] [*^and/or*] [[*husband/wife/partner's name*]/ [*^your/his/her*] [*^husband/wife/partner*]] received it?

INTERVIEWER NOTE: If inheritance was in the form of property, please ask respondent to estimate the value when they received it, rather than when it was eventually sold. [*^BLANK/INTERVIEWER NOTE: If respondent unable to separate out their share of the inheritance, please ask them to split it in half*]

ENTER amount to nearest £

RANGE: 1..999999997

*IF inheritance amount = NONRESPONSE*

[*iaiv = NONRESPONSE*]

**IAIVB\***

Was it less than [*^amount*], more than [*^amount*] or what?

BRACKETS (5000, 50000, 100000, 500000)

END OF FILTER

END OF LOOP

END OF FILTER

*IF ever received any substantial gifts = NA, DK, REF, New Partner OR No*

[*(FF\_iag = 9991, 9998, 9999, empty or 2)*]

**IAG\***

[*^Have/has*] [*^you/name*] [*^and/or*] [[*husband/wife/partner's name*]/ [*^your/his/her*] [*^husband/wife/partner*]] ever received any substantial gifts. That is, ones that were worth more than about £1,000 in today's money?

INTERVIEWER NOTE: £1,000 in today's money is equivalent to approximately £20 in the 1920s and 1930s, £30 in the 1940s, £45 in the 1950s, £65 in the 1960s, £130 in the 1970s, £400 in the 1980s and £650 in the 1990s.

INTERVIEWER NOTE: Do not include gifts given directly to the respondent's children, or given solely for the benefit of the respondent's children

01 Yes

02 No

END OF FILTER

*IF received substantial gift = yes*

[*IAG = 1*]

**IAGN\***

How many such gifts [*^have/has*] [[*^you/name*] [*^and/or*] [[*husband/wife/partner's name*] [*^your/his/her*] [*^husband/wife/partner*]] received in total?

ENTER number.

RANGE: 0..97

LOOP UP TO 3 TIMES

*IF couple with joint finances = yes*

*[IAAsk = Yes]*

**IAGWH\***

Thinking about the [**^largest/next largest**] gift, was it [**^you/name**] who received this, or was it given to **[[husband/wife/partner's name]/ ^your/his/her ^husband/wife/partner]]** jointly?

INTERVIEWER: IF GIFT WAS RECEIVED JOINTLY WITH A FORMER HUSBAND/WIFE/PARTNER THEN THE CORRECT ANSWER IS RESPONDENT

- 01 [**^respondent's name**]
- 02 [**^husband/wife/partner's name**]
- 03 Both/jointly

*ELSEIF not joint finances and in a couple [(IAAsk = 2) AND (lcouplen[pnum]>0)]*

**IAGJ\***

Thinking about the [**^largest/next largest**] gift, was this gift received by **[[^you/name]]** alone or jointly with [**^husband/wife/partner's name**]?

- 01 just [**^respondent's name**]
- 02 jointly with [**^husband/wife/partner's name**]

END OF FILTER

**IAGWN\***

[**^Thinking about the ^largest/next largest**] gift, when/ When] did [**^your/his/her ^husband/wife/partner]]/^you/^name]]** receive this gift?

- 01 Year
- 02 Age

*IF when received gift = year*

*[IAGWn=1]*

**IAGY\***

ENTER YEAR

INTERVIEWER NOTE: Please enter approximate date or mid-point of a decade if the respondent is uncertain.

RANGE: 1900..2020

*[CHECK IA58] CHECK: IF date received gift is later than the interview date*

*IF iagy > lIntDat.Year*

*This is in the future. Please change.*

*ELSEIF when received gift = age [IAGWn = 2]*

**IAGAG\***

ENTER AGE WHEN GIFT RECEIVED

/ENTER AGE OF THE PERSON RECEIVING THE GIFT AT THE TIME THEY RECEIVED IT. INTERVIEWER NOTE: if the respondent received it jointly with their partner, they should give us the AGE that THE RESPONDENT WAS when he or she received the inheritance.

INTERVIEWER NOTE: Please enter approximate age or mid-point of a decade if the respondent is uncertain.

RANGE: 0..120

**[CHECK IA59] CHECK:** IF age received gift is older than the current  
iagag> IPartAge  
This is older than the respondent's partner/spouse's current age of ^IPartAge.  
Please change.

END OF FILTER

**IAGWM\***

From whom did [[^you/name] [^and/or] [[husband/wife/partner's name]/  
[^your/his/her] [^husband/wife/partner]] receive this gift?

INTERVIEWER NOTE: This gift was received JOINTLY with the respondent's  
spouse/partner, please record the relationship to the RESPONDENT/ This  
inheritance was received by the respondent's spouse/partner. Please record the  
relationship of the donor to the SPOUSE/PARTNER

- 01 Grandparent
- 02 Parent
- 03 Parent-in-law
- 04 Child
- 05 Aunt/uncle
- 06 Respondent's sibling
- 07 Husband/wife/partner's sibling
- 08 Husband/wife/partner/ex-spouse
- 09 Other relative
- 10 Non relative
- 11 Other

IF gift donor = other  
| [IAGWm=9]

**IAGMX\***

Enter other response

END OF FILTER

**IAGV\***

What was [^your/his/her share of] the value of this gift at the time that [[^you/name]  
[^and/or] [[husband/wife/partner's name]/ [^your/his/her] [^husband/wife/partner]]  
received it?

INTERVIEWER NOTE: If gift was in the form of property, please ask respondent to  
estimate the value when they received it, rather than when it was eventually sold.

INTERVIEWER NOTE: If gift was in the form of property, please ask respondent to  
estimate the value when they received it, rather than when it was eventually sold.

[^BLANK/INTERVIEWER NOTE: If respondent unable to separate out their share of  
the gift, please ask them to split it in half]

ENTER amount to nearest £

RANGE: 1..999999997

IF gift amount = NONRESPONSE  
| [iagv = NONRESPONSE]

**IAGVB\***

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2000, 5000, 10000, 50000)

END OF FILTER

END OF LOOP

END OF FILTER

### ASKPAY

Computed: Person number answering household level questions (should only be asked once).

*Derivation logic: Initially AskPay computed to zero. At the end of the relevant set of questions, set AskPay to person number who completed the questions.*

Range: 0..16

### ASK ONCE PER HOUSEHOLD ONLY

*IF not already asked this set of questions OR person is the assigned person for these questions OR (relationship status = EMPTY and question about personal loans not answered*

*[(AskPay=0) OR (AskPay=allocp[pnum]) OR (lcouple[pnum]= EMPTY)) AND  
laLoan<>EMPTY]*

### IAFCON\*

#### SHOWCARD F7

Which of the phrases on the card best describes how [<sup>^</sup>you / [<sup>^</sup>name]] [<sup>^</sup>BLANK / and [<sup>^</sup>your / his / her] [<sup>^</sup>husband / wife / partner]] [<sup>^</sup>are / is] 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 (marital status from household grid = married, cohabiting) and (where partner living <> elsewhere)*

*[(ICouple = [1, 2]) and (DMWhat <> elsewhere)]*

### IAORGF

#### SHOWCARD F8

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
- 95 Some other arrangement

*IF method of organising finances = some other arrangement*

*[laorgf = 95]*

### IAORGD

INTERVIEWER: PLEASE RECORD DETAILS.

String 60

***[Open responses to IAORGD were coded and then incorporated into IAORGF.]***

END OF FILTER

**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 Another family member (e.g. son/daughter)
- 95 Other

*IF person with final say = other*

*[Iafind = 95]*

**IAFINW**

INTERVIEWER: WRITE IN OTHER ANSWER.

String 20

***[Open responses to IAFINW were coded and then incorporated into IAFINW.]***

END OF FILTER

END OF FILTER

END OF FILTER

**IAFINS**

How worried, if at all, are you about your future financial situation

- 1. Not at all worried
- 2. Not very worried
- 3. Somewhat worried
- 4. Very worried
- 5. Extremely worried

**IAHHINC**

Other household members make an important contribution to overall finances in some households. In order to understand your household situation better we would like to collect some very brief summary information about the financial circumstances of *[^names of adults aged 16 and over in the household]*.

INTERVIEWER: Press <1> and <Enter> to continue

- 1 Continue
- 2 SPONTANEOUS: Respondent absolutely refuses outright to answer these questions

***[CHECK IA60] CHECK: IAHHInc<>HardRef***

*Are you sure that the respondent will not answer these questions? This option should only be used for extreme cases. The respondent will have the option to refuse at individual questions if they do choose to continue.*

*IF household income permission = Respondent refuses*

*[IAHHInc=2]*

**IAHHINCR**

INTERVIEWER: PLEASE EXPLAIN WHY THE RESPONDENT IS REFUSING TO ANSWER THESE QUESTIONS  
STRING[100]

*ELSE IF household income permission = Respondent accepts to answer [IAHHInc=1]*

*LOOP FOR hloop:= 1 TO 16*

*IF person is ineligible for IA block in individual questionnaire and present in the household and aged 16+ [Indstat[hloop] < 1 AND DMPres[hloop]=Yes AND DMAge[hloop] >= 16]*

**IAPAYW\***

During the last year did [^person name] do any work for pay?

1 Yes

2 No

**Responses to the 16 household members are recoded in variables:**

Description	Variable	Archive
Whether person 1 (non eligible HH member) did any work for pay in last year	lapayw1	lapyw1
Whether person 2 (non eligible HH member) did any work for pay in last year	iapayw2	iapyw2
Whether person 3 (non eligible HH member) did any work for pay in last year	lapayw3	lapyw3
Whether person 4 (non eligible HH member) did any work for pay in last year	lapayw4	lapyw4
Whether person 5 (non eligible HH member) did any work for pay in last year	lapayw5	lapyw5
Whether person 6 (non eligible HH member) did any work for pay in last year	lapayw6	lapyw6
Whether person 7 (non eligible HH member) did any work for pay in last year	lapayw7	lapyw7
Whether person 8 (non eligible HH member) did any work for pay in last year	lapayw8	lapyw8
Whether person 9 (non eligible HH member) did any work for pay in last year	lapayw9	lapyw9
Whether person 10 (non eligible HH member) did any work for pay in last year	lapayw10	lapyw10
Whether person 11 (non eligible HH member) did any work for pay in last year	lapayw11	lapyw11
Whether person 12 (non eligible HH member) did any work for pay in last year	lapayw12	lapyw12
Whether person 13 (non eligible HH member) did any work for pay in last year	lapayw13	lapyw13
Whether person 14 (non eligible HH member) did any work for pay in last year	lapayw14	lapyw14
Whether person 15 (non eligible HH member) did any work for pay in last year	lapayw15	lapyw15
Whether person 16 (non eligible HH member) did any work for pay in last year	lapayw16	lapyw16

*IF whether did paid work during last year = yes  
[[lapayw = 1]*



**IAERN**

About how much money did [^person name] earn from all jobs in the last year, before any tax or other deductions?

1 Continue

**IAEARNB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 20000, 35000, 100000)

**[Bracket results are recoded in IAEARL, IAEARU, IAEARE, IAEARR, for the 2nd to 16<sup>th</sup> loops in IAEAR2L IAEAR2U IAEAR2E IAEAR2R to IAEA16L IAEA16U IAEA16E IAEA16R]**

END OF FILTER

END OF LOOP

END OF FILTER

**IABENR**

Not including any job income, did [^names of other household members] receive anything in the last year from benefits, pensions, interest, gifts or anything else (before any taxes or deductions)?

1 Yes

2 No

*IF other household member receiving non-work income = yes*

*[IABENR = 1]*

**IAREC**

Not including any job income, about how much in total did [^name] [^BLANK / and ^name] receive in the last year from benefits, pensions, interest, gifts or anything else (before any taxes or deductions)?

Range: 0..999997

*IF IAREC = NON RESPONSE [IAREC = DK, RF]*

**IARECB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (250, 500, 1000, 5000)

**[Bracket results are recoded in IARECL, IARECU, IARECE, IARECR]**

END OF FILTER

**IAOM\***

[^Do / does] [^name] [^BLANK / and [^name]] have more than £1,000 total in bank accounts, other financial assets, vehicles, property, or other investments?

1 Yes

2 No

*IF whether have / has more than £1,000 = Yes*

*[Iaom = 1]*

**IAOMM**

About how much altogether would that amount to, minus any debts he / she / they

might have?  
Range: 0..999997

*IF IAOMM = NON RESPONSE [IAOMM = DK,r RF]*

**IAOMMB**

Would it amount to less than [**^amount**], more than [**^amount**] or what?  
BRACKETS (1000, 5000, 20000, 150000)

*[Bracket results are recoded in IAOMML, IAOMMU, IAOMME, IAOMMR]*

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**IAX**

INTERVIEWER: The Income and Assets section is finished.

Please enter 1 here to make the program store the current time and date.

Range: 1..1

# HOUSING AND CONSUMPTION MODULE (HO)

## HOPID

Computed: Person Number to answer the HO module

Range: 1..16

## HOASK

Computed: Total number of previous householders still in household.

Range: 0..97, EMPTY

## HOELI

Computed: Whether at least one person named at HoWHN is eligible for interview

1 Yes

2 No

*IF (name in who's name the accommodation is owned or rented at last interview = RESPONSE) AND (Total number of previous householders still in household = total number of current householders in household) [(ff\_HHldr = RESPONSE) AND (HoAsk = CARDINAL(ff\_HHldr))]*

### HOWHO\*

I'd like to check some general information about [^your / ^name's]household's accommodation /BLANK] Is [^your / his / her] accommodation still in [^your / ^name's] / your and [^name's] / etc.] name?

1 Yes

2 No

END OF FILTER

*IF whether accommodation is in same person's name as last time = EMPTY OR whether accommodation is in same person's name as last time = no [HoWho = EMPTY OR HoWho = 2]*

### HOWHN\*

[^BLANK / I'd like to get some general information about [^your / ^name's] household's accommodation]. In whose name is the accommodation owned or rented?

CODE ALL THAT APPLY.

01 [^Person's name[1]]

02 [^Person's name[2]]

03 [^Person's name[3]]

04 [^Person's name[4]]

05 [^Person's name[5]]

06 [^Person's name[6]]

07 [^Person's name[7]]

08 [^Person's name[8]]

09 [^Person's name[9]]

10 [^Person's name[10]]

11 [^Person's name[11]]

12 [^Person's name[12]]

13 [^Person's name[13]]

14 [^Person's name[14]]

15 [^Person's name[15]]

16 [^Person's name[16]]  
 97 Not a household member

Description	Variable	Archive
Person 1	HoWhN1	HOWH1
Person 2	HoWhN2	HOWH2
Person 3	HoWhN3	HOWH3
Person 4	HoWhN4	HOWH4
Person 5	HoWhN5	HOWH5
Person 6	HoWhN6	HOWH6
Person 7	HoWhN7	HOWH7
Person 8	HoWhN8	HOWH8
Person 9	HoWhN9	HOWH9
Person 10	HoWhN10	HOWH10
Person 11	HoWhN11	HOWH11
Person 12	HoWhN12	HOWH12
Person 13	HoWhN13	HOWH13
Person 14	HoWhN14	HOWH14
Person 15	HoWhN15	HOWH15
Person 16	HoWhN16	HOWH16
Not a household member	HoWhN97	HOWH97

*LOOP FOR k:= 1 TO 16 (please note: each person included in HOWHN gets asked the following questions in turn)*

*IF (((person's name in HOWhN still present in household = yes) AND NOT (whose name accommodation is owned or rented in = person's name in HOWHN)) AND NOT (person number of partner = person in whose name the accommodation is owned or rented)) AND (person's age >= 16) [(((DMPres = 1) AND NOT (HoWhN = k)) AND NOT (CoupleN = HoWhN)) AND (IAgeOf >= 16)]*

**HOBAS\***

On what basis [^are you / is [^name]] living here? [^Do you / Does [^name] / Does your household / Does [^name's] household]

...READ OUT... CODE ONE ONLY.

- 1 ... pay regular rent,
- 2 pay something from time to time,
- 3 or, live here rent free?

**[Responses to HOBAS are recoded in HOBAS, HOBAS2 to HOBAS16]**

*IF basis on which lives here = pay regular rent  
 [HoBas = 1]*

**HOBP\***

Thinking about [^your / [^name's] / you and your household's] last rent payment, what period did it cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year

09 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)

**[Responses to HOBP are recoded in HOBP, HOBP2 to HOBP16]**

*IF period covered by last rent payment = RESPONSE [HoBP = RESPONSE]*

**HOBA\***

How much was [*^your / ^name's / you and your household's*] last rent payment?

INTERVIEWER: Enter amount.

Range: 0..99997

**[Responses to HOBA are recoded in HOBA, HOBA2 to HOBA16]**

*[CHECK HO1] SIGNAL: IF (((period covered by last rent payment = One week) AND (amount of last rent >300)) OR ((period covered by last rent payment = two weeks) AND (amount of last rent > 600))) OR ((period covered by last rent payment = [four weeks, one month] AND (amount of last rent >1200))) OR ((period covered by last rent payment = one year) AND (amount of last rent >15000))*

*[(((HoBP = 1 week) AND (HoBA > 300)) OR ((HoBP = 2 weeks) AND (HoBA > 600))) OR ((HoBP = 4, 5 weeks) AND (HoBA > 1200))) OR ((HoBP = 52 weeks) AND (HoBA > 15000))]*

*INTERVIEWER: Are you sure? £[^HoBA] seems high - please check.*

END OF FILTER

*IF (((Period covered by last rent payment = DK) OR (Period covered by last rent payment = RF)) OR (amount of last rent = DK)) OR (amount of last rent = RF)*

*[(((HoBP = DK) OR (HoBP = RF)) OR (HoBA = DK)) OR (HoBA = RF)]*

*IF period covered by last rent payment = one week*

*[HoBP = 1]*

**HOBPW\***

Was it less than [*^20 / 40 / 60 / 150 pounds*], more than [*^20 / 40 / 60 / 150 pounds*] or what?

**[Bracket results are recoded in HOBAWL HOBAWU HOBawe HOBawR for person 1 to HOB16WL HOB16WU HOB16WE HOB16WR for person 16]**

*ELSE IF period covered by last rent payment = two weeks [HoBP = 2]*

**HOBPF\***

Was it less than [*^40 / 80 / 120 / 300 pounds*], more than [*^40 / 80 / 120 / 300 pounds*] or what?

[Bracket results are recoded in **HOB AFL HOB AFU HOB AFE HOB AFR** for person 1 to **HOB16FL HOB16FU HOB16FE HOB16FR** for person 16]

ELSE IF period covered by last rent payment = [four weeks, one month] [HoBP = [4, 5]]

**HOBPM\***

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600 pounds] or what?

[Bracket results are recoded in **HOB AML HOB AMU HOB AME HOB AMR** for person 1 to **HOB16ML HOB16MU HOB16ME HOB16MR** for person 16]

ELSE IF period covered by last rent payment = [one year, lump sum] [HoBP = [52, 95]]

**HOBPY\***

Was it less than [^1000 / 2000 / 3000 / 7500 pounds], more than [^1000 / 2000 / 3000 / 7500 pounds] or what?

[Bracket results are recoded in **HOBAYL HOBAYU HOBAYE HOBAYR** for person 1 to **HOB16YL HOB16YU HOB16YE HOB16YR** for person 16]

ELSE

**HOBPO\***

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600 pounds] or what?

[Bracket results are recoded in **HOB AOL HOB AOU HOB AOE HOB AOR** for person 1 to **HOB16OL HOB16OU HOB16OE HOB16OR** for person 16]

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

END OF LOOP

IF (whether interviewing at same address as last time = yes) AND (how occupies accommodation (Last interview) = RESPONSE)

[(QHD.DHSameH = Yes AND ff\_HoTenu = [1..6]) THEN HoTenuN]

**HOTENUN\***

I'd like to check how [^this accommodation is owned or rented / [^name] and [^name] / you occupy this accommodation / [^name] occupies this

accommodation / your / [^name's] household occupies this accommodation].  
[^Is this accommodation still owned outright? /  
Is this accommodation still being bought with the help of a mortgage or loan?  
/ Is this accommodation still part-rented, part-owned? /  
Is this accommodation still rented? /  
Is this accommodation still rent free? /  
Is this accommodation still squatted? /  
Do [^name] and [^name] still own this accommodation outright? /  
Are [^name] and [^name] still buying this accommodation with the help of a  
mortgage or loan?/  
Are [^name] and [^name] still paying part rent and part mortgage (shared  
ownership) /  
Are [^name] and [^name] still renting this accommodation? /  
Are [^name] and [^name] still living here rent free? /  
Are [^name] and [^name] still squatting? /  
Does [^name] / still own this accommodation outright? /  
Is [^name] still buying this accommodation with the help of a mortgage or loan? /  
Is [^name] still paying part rent and part mortgage (shared ownership)? /  
Is [^name] still renting this accommodation? /  
Is [^name] still living here rent free? /  
Is [^name] still squatting? /  
[^Do you / Does [^name]] still own this accommodation outright? /  
[^Are you / Is [^name]] still buying this accommodation with the help of a  
mortgage or loan?/  
[^Are you / Is [^name]] still paying part rent and part mortgage (shared  
ownership)? /  
[^Are you / Is [^name]] still renting this accommodation? /  
[^Are you / Is [^name]] still living here rent Free? /  
[^Are you / Is [^name]] still squatting? /  
[^Do you / does [^name] / does your / [^name's] household still own this  
accommodation outright? /  
Is [^your / [^name's]] household still buying this accommodation with the help  
of a mortgage or loan? /  
Is [^your / [^name's]] household still paying part rent and part mortgage  
(shared ownership)? /  
Is [^your / [^name's]] household still renting this accommodation? /  
Is [^your / [^name's]] household still living here rent free? /  
Is [^your / [^name's]] household still squatting?  
1 Yes  
2 No

END OF FILTER

*IF previous tenure status confirmation <> Yes*

[HoTenuN <> 1]

**HOTENU\***

**SHOWCARD G1**

In which of these ways [^does the owner own / does the renter rent / do you /  
[^name] and [^name] occupy / does [^name] occupy] this accommodation?

INTERVIEWER: IF OWN OUTRIGHT OR OWN WITH HELP OF A MORTGAGE OR  
LOAN, INCLUDE OWNING WITH EQUITY RELEASE.

- 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

**[CHECK HO2] SIGNAL:** IF how occupies accommodation = Buying it with the help of a mortgage AND tenure = No

[HoTenu = 2 AND HoTenuN = 2]

CHECK: Wave 1 tenure = buying with mortgage [HoTenu = Buymortg]

The respondent has already said (at HoTenuN) that they are no longer buying the accommodation with a mortgage or loan. Please check.

END OF FILTER

IF (how occupies accommodation = [pay part rent and part mortgage, rents]) AND at least one person named at HoWHN is eligible for interview = Yes)

[(HoTenu = 3, 4) AND (HoEli = 1)]

**HOJOB\***

Does the accommodation go with the job of someone in the household?

- 1 Yes
- 2 No

**HOLAND\***

**SHOWCARD G2**

Who is [**^your / ^name's**] landlord?

INTERVIEWER: 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 / ^name's**] accommodation provided ... READ OUT ...

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

END OF FILTER

IF how occupies accommodation = pays part rent and part mortgage AND at least one person named at HoWHN is eligible for interview = yes

[HoTenu = 3 AND HoEli = 1]

**HOPART\***

What percentage of the property [**^are you / is ^name**] buying?

- 1 25 percent
- 2 50 percent
- 3 75 percent
- 95 Other

IF percentage of property buying = Other

[HoPart = 95]

**HOPPR\***

INTERVIEWER: ENTER OTHER PERCENTAGE



Range: 1..99

END OF FILTER

END OF FILTER

*IF (how occupies accommodation = [rents, pays part rent and part mortgage]) AND (at least one person named at HoWHN is eligible for interview = Yes)*

*[(HoTenu = 3, 4) AND (HoEli = 1)]*

**HOPERI\***

Thinking about [*^your / ^name's*] last rent payment, what period did this cover?

INTERVIEWER: If 100% rent rebate, code 97.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 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 RENT PAYMENTS

*IF (period covered by last rent payment = RESPONSE) AND (period covered by last rent payment <> doesn't make rent payments)*

*[(HoPeri = RESPONSE) AND (HoPeri <> 97)]*

**HORENT\***

How much was [*^your / ^name's*] last rent payment (including any services or charges but after any rebates)?

INTERVIEWER: If 100% rent rebate, code 99997.

Range: 0..99997

*[CHECK HO3] SIGNAL: IF((((period covered by last rent payment = 1 week) AND (amount of last rent repayment > 300)) OR ((period covered by last rent payment = 2 weeks) AND (amount of last rent repayment >600))) OR ((period covered by last rent payment = [4 weeks, 1 month] AND (amount of last rent repayment >1200))) OR ((period covered by last rent payment = [3 weeks, 2 / 3 / 6 months, 8 / 9 / 10 times a year, 1 year, less than 1 week, lump sum] AND (amount of last rent repayment >15000)))*

*[[(((HoPeri = 1 week) AND (HoRent >300)) OR ((HoPeri = 2 weeks) AND (HoRent >600))) OR ((HoPeri = 4, 5 weeks) AND (HoRent >1200))) OR ((HoPeri = 3, 7.. 26, 52, 90, 95 weeks) AND (HoRent >15000))]*

*INTERVIEWER: Are you sure? £[^HoRent] seems high - please check.*

END OF FILTER

*IF (((period covered by last rent payment = DK) OR (period covered by last*

rent payment = RF)) OR (amount of last rent repayment = DK)) OR (amount of last rent repayment = RF)  
[(((HoPeri = DK) OR (HoPeri = RF)) OR (HoRent = DK)) OR (HoRent = RF)]

IF period covered by last rent payment = one week  
[HoPeri = 1]

**HORNTWB\***

Was it less than [^20 / 40 / 60 / 150 pounds], more than [^20 / 40 / 60 / 150 pounds] or what?

**[Bracket results are recoded in horenwl, horenwu, horenwe, mhorenwr]**

ELSE IF period covered by last rent payment = two weeks [HoPeri = 2]

**HORNTFB\***

Was it less than [^40 / 80 / 120 / 300 pounds], more than [^40 / 80 / 120 / 300 pounds] or what?

**[Bracket results are recoded in horenfl, horenfu, horenfe, horenfr]**

ELSE IF period covered by last rent payment = [four weeks, one month]  
HoPeri = [4, 5]]

**HORNTMB\***

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600pounds] or what?

**[Bracket results are recoded in horenml, horenmu, horenme, horenmr]**

ELSE IF period covered by last rent payment = [one year, lump sum]  
[HoPeri = [52, 95]]

**HORNTYB\***

Was it less than [^1000 / 2000 / 3000 / 7500 pounds], more than [^1000 / 2000 / 3000 / 7500 pounds] or what?

**[Bracket results are recoded in horenyl, horenyu, horenye, horenyr]**

ELSE

**HORNTOB\***

Was it less than [^80 / 160 / 240 / 600 pounds], more than [^80 / 160 / 240 / 600 pounds] or what?

**[Bracket results are recoded in horenol, horenou, horenoe, horenor]**

END OF FILTER

END OF FILTER

IF (amount of last rent repayment <>DK) AND (period covered by last rent payment <> doesn't make rent payments)  
[(HoRent <> 99997) AND (HoPeri <> 97)]

**HOINCL\***

**SHOWCARD G3**

Did [*^your / ^name's*] 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

*[code maximum 7 out of 7 possible responses]*

Description	Variable	Archive
Water charges	HoIncl1	Hoinclwa
Sewerage charges	HoIncl2	Hoinclse
Land or business premises	HoIncl3	Hoinclla
Separate Garage	HoIncl4	Hoinclga
Heating or lighting or hot water	HoIncl5	Hoinclhe
Council Tax	HoIncl6	Hoinclco
None of these	HoIncl96	Hoincl96

*[CHECK HO4] CHECK: IF (items last rent payment included = none) AND (items [last rent payment included = at least one other item)*

*[HoIncl = 96 AND HoIncl = 1...6]*

INTERVIEWER: 'None' is an exclusive code at this question. Please change!

**HOINCA\*****SHOWCARD G4**

Did [*^your / ^name's*] 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

*[code maximum 6 out of 7 possible responses]*

Description	Variable	Archive
Meals	HoInca1	Hoiname
Gardening	HoInca2	Hoinagd
Cleaning	HoInca3	Hoinacl
Warden or porter	HoInca4	Hoinawp
Security service/guard	HoInca5	Hoinasg
Other services	HoInca95	Hoina95
None of these	HoInca96	Hoina96

*[Open responses to HOOINC are coded and where possible merged with the multiple responses to HOINCA]*

Description	Variable	Archive
Meals	HolnaM1	Hoinamme
Gardening	HolnaM2	Hoinamgd
Cleaning	HolnaM3	Hoinamcl
Warden or porter	HolnaM4	Hoinamwp
Security service/guard	HolnaM5	Hoinamsg
Other answer - not codeable	HolnaM85	Hoinam85
Irrelevant answer - not codeable	HolnaM86	Hoinam86
None of these	HolnaM96	Hoinam96

*IF items last rent payment included = other*  
*[Holnca = 95]*

**HOOINC\***

What other services does [*^your / ^name's*] rent include?

INTERVIEWER: Write in.

String 60

END OF FILTER

*[CHECK HO5]: CHECK IF (items last rent payment included = none) AND (items last rent payment included = at least one other item)*

*[HolnaZ = 96 AND HolnaZ = 1...95]*

EDITOR: 'None' is an exclusive code at this question. Please change!

**HOHBEN\***

Did [*^you/he/she*] receive any housing benefit (also known as rent rebate or rent allowance) / local housing allowance to help pay [*^your/his/her*] last rent?

1 Yes

2 No

*IF whether received housing benefit for last rent = yes*

*[HoHBen = 1]*

**HORHB\***

Did [*^you/he/she*] receive the benefit directly (cash, cheque or into a bank account) or was it deducted from [*^your/his/her*] rent?

1 Deducted from rent

2 Received it directly

*IF how received benefit = received directly*

*[HorHB = 2]*

**HOHBCK\***

Can I just check, was the last rent payment that [*^you/he/she*] just told me about before or after taking off the Housing Benefit?

1 Before

2 After

END OF FILTER

END OF FILTER

END OF FILTER

*IF (period covered by last rent payment = doesn't make rent payments) OR  
(amount of last rent payment = 99997) OR (how received benefit = deducted  
from rent)*

*[(HoPeri = 97) OR (HoRent = 99997) OR (HorHB = 1)]*

**HOREBP\***

Thinking about what [*^your / ^name's*] last rent payment would have been if housing benefit had not been deducted from it, what period would this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 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 last rent payment if housing benefit not deducted = response*

*[HOREbp = response]*

**HOREBA\***

How much would [*^your / ^name's*] last rent payment have been if housing benefit had not been deducted from it?

Range: 0..99997

*[CHECK HO6] SIGNAL: IF (((period rent covers = one week) AND (last rent payment if housing benefit not deducted >300)) OR ((period rent covers = two weeks) AND (last rent payment if housing benefit not deducted >600))) OR ((period rent covers = [four weeks, one month]) AND (last rent payment if housing benefit not deducted > 1200))) OR ((period rent covers = [three weeks, two / three / six months, eight / nine / ten times a year, one year, less than once a week, lump sum]) AND (last rent payment if housing benefit not deducted > 15000))*

*[(((HoPeri = 1 week) AND (HoReba > 300)) OR ((HoPeri = 2 weeks) AND (HoReba > 600))) OR ((HoPeri = 4, 5 weeks) AND (HoReba >1200))) OR ((HoPeri = 3, 7... 26, 52, 90, 95 weeks) AND (HoReba >15000))]*

*INTERVIEWER: Are you sure? £[*^HoReba*] seems high - please check.*

END OF FILTER

*IF (last rent payment if housing benefit not deducted = DK OR RF) OR  
(period covered by last rent payment = DK OR RF)*

*[(HOREba = NONRESPONSE) OR (HOREbp = NONRESPONSE)]*

*IF period covered by last rent payment = one week*

*[HoPeri = 1]*

**HOREBWB\***

Would it have been less than [<sup>^</sup>30 / 50 / 75 / 150 pounds], more than [<sup>^</sup>30 / 50 / 75 / 150 pounds] or what?

**[Bracket results are recoded in HOREBWL HOREBWU HOREBWE HOREBWR]**

ELSE *IF period covered by last rent payment = two weeks [HoPeri = 2]*

**HOREBFB\***

Would it have been less than [<sup>^</sup>60 / 100 / 150 / 300 pounds], more than [<sup>^</sup>60 / 100 / 150 / 300 pounds] or what?

**[Bracket results are recoded in HOREBFL HOREBFU HOREBFE HOREBFR]**

ELSE *IF period covered by last rent payment = [four weeks, one month] [HoPeri = [4, 5]]*

**HOREBMB\***

Would it have been less than [<sup>^</sup>120 / 200 / 300 / 600 pounds], more than [<sup>^</sup>120 / 200 / 300 / 600 pounds] or what?

**[Bracket results are recoded in HOREBML HOREBMU HOREBME HOREBMR]**

ELSE *IF period covered by last rent payment = [one year, lump sum] [HoPeri = [52, 95]]*

**HOREBYB\***

Would it have been less than [<sup>^</sup>1500 / 2500 / 3750 / 7500 pounds], more than [<sup>^</sup>1500 / 2500 / 3750 / 7500 pounds] or what?

**[Bracket results are recoded in HOREBYL HOREBYU HOREBYE HOREBYR]**

ELSE

**HOREBOB\***

Would it have been less than [<sup>^</sup>120 / 200 / 300 / 600 pounds], more than [<sup>^</sup>120 / 200 / 300 / 600 pounds] or what?

**[Bracket results are recoded in HOREBOL HOREBOU HOREBOE HOREBOR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (whether last rent payment was before or after taking off housing benefit = before) OR rent payment made before or after housing benefit =*

*NONRESPONSE*

*[HoHBck = 1 OR HoHBck = NONRESPONSE]*

**HOHBP\***

Thinking about [*^your/^Name*]'s] last housing benefit payment [*^you/he/she*] received, what period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Calendar months
- 08 Eight times a year
- 09 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 covered by last housing benefit payment = response then)*  
*[HOHBP = RESPONSE]*

**HOHBA\***

How much housing benefit did [*^you/^Name*] receive last time?  
Range: 0..99997

END OF FILTER

*IF amount of housing benefit received last time = NONRESPONSE OR*  
*period covered by housing benefit payment = NONRESPONSE*  
*[HoHBa = NONRESPONSE OR HoHBP = NONRESPONSE]*

*IF period covered by housing benefit payment = one week*  
*[HoHBP = 1]*

**HOHBWB**

Would it have been less than [*^30 / 50 / 75 / 150 pounds*], more than [*^30 / 50 / 75 / 150 pounds*] or what?

**[Bracket results are recoded in HOHBAWL HOHBAWU HOHBABE HOHBABR]**

*ELSE IF period covered by housing benefit payment = two weeks [HoHBP = 2]*

**HOHBFB**

Would it have been less than [*^60 / 100 / 150 / 300 pounds*], more than [*^60 / 100 / 150 / 300 pounds*] or what?

**[Bracket results are recoded in HOHBAFL HOHBAFU HOHBABE HOHBAFR]**

*ELSE IF period covered by housing benefit payment = four weeks, one month [HoHBP = 4, 5]*

**HOHBMB**

Would it have been less than [*^120 / 200 / 300 / 600 pounds*], more than [*^120 / 200 / 300 / 600 pounds*] or what?

**[Bracket results are recoded in HOHBAML HOHBAMU HOHBAME HOHBAMR ]**

ELSE IF period covered by housing benefit payment = [one year, lump sum]  
[HoHBP = 52, 95]

**HOHBYB**

Would it have been less than [<sup>^</sup>1500 / 2500 / 3750 / 7500 pounds], more than [<sup>^</sup>1500 / 2500 / 3750 / 7500 pounds] or what?

**[Bracket results are recoded in HOHBAYL HOHBAYU HOHBAYE HOHBAYR ]**

ELSE

**HOHBOB**

Would it have been less than [<sup>^</sup>120 / 200 / 300 / 600 pounds], more than [<sup>^</sup>120 / 200 / 300 / 600 pounds] or what?

**[Bracket results are recoded in HOHBAOL HOHBAOU HOHBAOE HOHBAOR ]**

END OF FILTER

END OF FILTER

END OF FILTER

IF (period covered by last rent payment = doesn't make rent payments) OR  
(last rent payment = 100% rebate)  
[(HoPeri = 97) OR (HoRent = 99997)]

**HOHB\***

**SHOWCARD G4a**

Does [<sup>^</sup>your / [<sup>^</sup>name's]] accommodation include any of these?

PROBE: What else?

CODE ALL THAT APPLY.

- 1 Meals
- 2 A garden
- 3 Cleaning
- 4 Warden or porter
- 5 Security service / guard
- 95 Other services
- 96 None of these

**[code maximum 6 out of 7 possible responses]**

Description	Variable	Archive
Meals	HoHB1	HOHBME
A garden	HoHB2	HOHBGA
Cleaning	HoHB3	HOHBCL
Warden or porter	HoHB4	HOHBWP
Security service/guard	HoHB5	HOHB SG
Other services	HoHB95	HOHB95
None of these	HoHB96	HOHB96



**[CHECK HO7] CHECK:** IF (services included with accommodation = none) AND (services included with accommodation = at least one other item)  
 [HoHB = 96 AND HoHB = 1...95]

'None' is an exclusive code at this question. Please change!

IF (service included with accommodation = other) AND ((whether post interview editing question <> yes) OR (services included with accommodation = EMPTY OR (services included with accommodation = Other))  
 [(HoHB = 95) AND ((EditQre <> 1) OR (HoHBz = EMPTY OR HoHBz = 95))])

**HOHBO\***

What other services does [^your / [^name's]] accommodation come with?  
 String 60

END OF FILTER

**[Open responses to HOHBO are coded and where possible merged with the multiple responses to HOHB]**

Description	Variable	Archive
Meals	HoHBM1	HOHBMME
A garden	HoHBM2	HOHBMGA
Cleaning	HoHBM3	HOHBMCL
Warden or porter	HoHBM4	HOHBMWP
Security service/guard	HoHBM5	HOHBMMSG
Other answer - not codeable 01 to 05, or 96	HoHBM85	HOHBM85
Irrelevant response - not codeable 01 to 05, or 96	HoHBM86	HOHBM86
None of these	HoHBM96	HOHBM96

**[CHECK HO8] CHECK:** IF (services included with accommodation = none) AND (services included with accommodation = at least one other item)  
 [HoHBz = 96 AND HoHBz = 1...95]

EDITOR: 'None' is an exclusive code at this question. Please change!

END OF FILTER

**HORTSET\***

INTERVIEWER: The Renting section is finished.  
 Please enter <1> here to make the program store the current time and date.  
 Range: 1..1  
 [Don't Know and Refusal are not allowed]

END OF FILTER

**HOMSTSET\***

INTERVIEWER: Start of Property and Mortgages section.  
 Please enter <1> here to make the program store the current time and date.  
 Range: 1..1  
 [Don't Know and Refusal are not allowed]

IF (living in the same house as last time = no) and (way of occupying home at last interview = owned outright OR buying with mortgage OR shared ownership)  
 [(DhSameH = No) and (ff\_HOTenu = [own,buymortg,shownsh])]

**HOSSELL\***

[^Have you/has name] sold [^your/his/her] previous home which [^you/he/she] lived in when we last interviewed [^you/him/her] on [^date of previous interview]?

1 Yes

2 No

*IF sold home since previous interview = yes*

*[ HoSell = yes]*

**HOSOLD\***

How much did [^you/he/she] sell [^your/his/her] previous property for?

INTERVIEWER: Enter amount.

Range : 0.00..9999999.00

*IF (amount property sold for = DON'T KNOW) or (amount property sold for = RF)*

*[HoSold = DONT KNOW OR HoPay = RF]*

**HOSOLDB\***

Was it less than [^10000 / 20000 / 50000 / 150000 pounds], more than [^10000 / 20000 / 50000 / 150000 pounds] or what?

***[Bracket results are recoded in HOSOLDL HOSOLDU HOSOLDE HOSOLDR ]***

END OF FILTER

END OF FILTER

END OF FILTER

*IF moved since last interview, or moved between wave 3 and wave 4 and whether moved since last wave = no response*

*[(DhSameh <> Yes) OR (DhSameh = Yes AND ff\_HoMove = 9991, 9998, 9999, empty)]*

**HOMOVE\***

In what year did [^you/name] move to this accommodation?

INTERVIEWER: If born there, code year of birth.

IF ASKED: Code earliest year a member of household moved to the accommodation.

Range : 1900..2050

***[CHECK HO9] SIGNAL: IF year moved to accommodation > year of interview date [HoMove > FWYear]***

***INTERVIEWER: This is later than [^fwyear]! Please check!***

***[CHECK HO10] CHECK: IF this year < year of moving to accommodation***

***[SIntDat.YEAR < HoMove]***

***INTERVIEWER: This year is in the future (^homove)! Please change!***

***[CHECK HO11] SIGNAL: IF person's year of birth > year of moving to accommodation [IDoB[pnum].YEAR > HoMove]***

***INTERVIEWER: This is before [^iname] was born! Please check!***

END OF FILTER

IF (((how occupies accommodation = owns it outright, buying with a mortgage or loan, shared ownership]) AND (at least one person named at HoWHN is eligible for interview = yes)) AND NOT ((same accommodation as last time = yes) AND year accommodation bought (Last interview) = RESPONSE)))  
[(HOTenu IN [own,buymortg,shownsh] AND HoEli = Yes) THEN IF NOT(QHD.DhSameh = Yes AND ff\_HoYear = [1900..2050])]

**HOYEAR\***

In what year did [^you / ^name] buy this accommodation?  
Range: 1900..2050

**[CHECK HO12] SIGNAL:** IF year bought accommodation > year of the interview date  
IF [HoYear > FWYear]  
INTERVIEWER: This is later than [^fwyear]! Please check!

**[CHECK HO13] SIGNAL:** IF this year < year of buying accommodation  
[SIntDat.YEAR < HoYear]  
INTERVIEWER: This year is in the future (^hoyear)! Please change!

**[CHECK HO14] SIGNAL:** IF person's year of birth > year of buying accommodation  
[IDoB[pnum].YEAR > HoYear]  
INTERVIEWER: This is before [^iname] was born! Please check!

IF NOT ((Same accommodation as last time = yes) AND amount paid for property (Last interview) = RESPONSE)  
[NOT(QHD.DhSameh = Yes AND ff\_HoPay = RESPONSE)]

**HOPAY\***

How much did [^you / ^name] pay for the property?  
INTERVIEWER: Enter amount to the nearest £.  
Range: 0..9999997

IF amount paid for property = RESPONSE  
[HoPay = RESPONSE]

**[CHECK HO15] SIGNAL:** IF amount paid for the property > £500,000  
[HoPay > £500,000]  
INTERVIEWER: Are you sure? £[^HOPay] seems high - please check.

ELSE IF (amount paid for property = DONT KNOW) OR (amount paid for property = RF)  
[HoPay = DONT KNOW OR HoPay = RF]

**HOPAYB\***

Was it less than [^10000 / 20000 / 50000 / 150000 / 300000 pounds], more than [^10000 / 20000 / 50000 / 150000 / 300000 pounds] or what?

**[Bracket results are recoded in HOPAYL, HOPAYU, HOPAYE, HOPAYR]**

END OF FILTER

END OF FILTER

END OF FILTER

IF ((Same accommodation as last time = yes) and (who bought accommodation from at last interview = NA, DK, Ref, new partner)) OR (same accommodation as last time = no)  
| [(IAskpx[pnum] <> Yes) THEN IF ((QHD.DhSameh = Yes) AND (ff\_Hortb = | 9991, 9998, 9999, empty)) OR (QHD.DhSameh = No)]

**HORTB\***

**SHOWCARD G5**

Who did [*^you / ^name*] buy this accommodation from?

INTERVIEWER: 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 (who accommodation bought from at last interview <> council) AND (who accommodation bought from <> council) AND whether bought from council or local authority at last interview = NA, DK, Ref, new partner  
| [(IAskpx[pnum] <> Yes) THEN IF (HoRTB <> Council) AND (ff\_HoRTB = 1, 3,4,5,96) AND (ff\_HoRTBe =9991, 9998, 9999, empty)]]

**HORTBE\***

[*^Have you / has ^name*] ever bought a home from a council or local authority, for example under the Right to Buy scheme?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

IF (how occupies accommodation = [owns it outright, buying with a mortgage or loan, shared ownership]) AND (at least one person named at HoWHN is eligible for interview = Yes)  
| [(HoTenu = [1, 2, 3]) AND (HoEli = 1)]

**HOSELLP\***

How much would [*^you / ^name*] expect to get for [*^your / his / her*] home if [*^you / he / she*] sold it today?

INTERVIEWER: Please check that the correct number of zeros has been entered.  
Range: 0..9999997

**[CHECK HO16] SIGNAL:** IF amount expected to get if property sold > £1,000,000  
| [HoSellP >1000000]

INTERVIEWER: Are you sure? £[*^HOSellp*] seems high - please check.

IF (amount expected to get If property sold = DONT KNOW) OR (amount expected to get If property sold = RF)  
| [(HoSellP = DONT KNOW) OR (HoSellP = RF)]

**HOSELLPB\***

Would it be less than [*^50000 / 75000 / 125000 / 500000 pounds*], more than [*^50000 / 75000 / 125000 / 500000 pounds*] or what?

**[Bracket results are recoded in HOSELLL, HOSELLU, HOSELLE, HOSELLR]**

END OF FILTER

END OF FILTER

IF (((how occupies accommodation = own) AND (whether interviewing at same address as last time = no))) OR (((how occupies accommodation = own) AND (whether interviewing at same address as last time = yes)) AND how occupies accommodation = own) AND whether mortgage taken when bought accommodation (Last interview) = NA, DK, Ref, new partner )) OR how occupies accommodation (Last interview) = [renting, rent-free, squatting] OR how occupies accommodation (Last int) = NONRESPONSE))) AND (at least one person named at HoWHN is eligible for interview = yes))

[[IAskpx[pnum] <> Yes) AND HoTenu = Own AND NOT(QHD.DhSameh = Yes AND ff\_HoEvM = Yes or No) AND NOT(QHD.DhSameh = Yes AND ff\_HoTenu = [Buymortg, ShOwnsh]) AND HoEli = Yes]]

**HOEVM\***

When [^you / ^name]] bought this accommodation, did [^you / ^name]] take out a mortgage?

- 1 Yes
- 2 No

END OF FILTER

**HOORM\***

[^Did / Not including your original mortgage, did] [^you / ^name]] ever take out any [^BLANK / additional] mortgages or loans secured on this property?

- 1 Yes
- 2 No

IF ((how occupies accommodation = buying with a mortgage or loan, shared ownership) AND (at least one person named at HoWHN is eligible for interview = yes))

[[HoTenu =2,3) AND (HoEli = 1)]

IF ((number of outstanding mortgages at last interview >0 and (Same accommodation as last time = yes))

[[ff\_hooutm = [1..10]) AND (QHD.DhSameh = Yes)]

**HOOUTMC**

Our records show that last time we interviewed you, you had [^number of outstanding mortgages].

Mortgage circumstances can change over time - some people pay off their mortgage more quickly, borrow additional money on their mortgage or take out new mortgages. It's important that we understand [^your/name's] current mortgage situation correctly.

- 1 Continue
- 2 Dispute

END OF FILTER

**HOOUTM\***

How many mortgages or loans [^do you / does [^name]] have outstanding on

this property?

Range: 1..10

**[CHECK HO17] CHECK:** IF reports having no mortgages but tenure status given is buying with the help of mortgage

[HoOutM = 0 AND HoTenu = 2]

This is not possible, the respondent has no mortgages but states that home is owned with help of mortgage, please change tenure or mortgage details."

IF (number of mortgages outstanding (last int) >0) AND (Same accommodation as last time = yes) AND (number of mortgages outstanding (last int)) AND (mortgage records from last int disputed)

[(ff\_NMort > 0) AND (QHD.DhSameh = Yes) AND (ff\_NMort > HoOutm) AND (HoOUTMC <> Dispute)]

#### **HOCHM\***

Our records show that last time [^you/name] had [^number of mortgages at last interview] mortgages. Can I just check what happened to the other mortgage(s)?

- 1 Paid it/them off
- 2 Combined it with another mortgage
- 3 Partly paid off and partly combined with another mortgage
- 4 Respondent had forgotten about one or more mortgages

END OF FILTER

IF mortgage status = new mortgage, additional mortgage, previous mortgage missed at last interview

[HoDMSt = 2, 3, 4]

#### **HOMTY1N TO HOMTY5N\***

##### **SHOWCARD G6**

[^Thinking about [^your / [^name's]] [1<sup>st</sup>/2<sup>nd</sup>/3<sup>rd</sup> etc mortgage] what type of mortgage or loan is that?

INTERVIEWER: PLEASE REFER TO ANNUAL STATEMENT OR MORTGAGE PAPER WORK WHERE POSSIBLE.

- 1 A repayment mortgage or loan (where [^your / his / her] mortgage payments cover interest and part of the original loan)
- 2 An endowment mortgage (where [^your / his / her] mortgage payments cover interest only and [^you / he / she] save [^BLANK/s] separately to pay off the capital)
- 3 Part repayment and part endowment
- 4 A pension mortgage (where [^your / his / her] 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 type of mortgage or loan = other

[HoMTy = 95]

#### **HOMTO, HOMTO2 TO HOMTO15\***

What other type of mortgage or loan is that?

INTERVIEWER: Write in.

If interest only then go back and code this at the previous question.

String 60

END OF FILTER

*IF type of mortgage or loan <> equity*  
*[HoMTy <> 97]*

**HORMO1N TO HORMO5N\***

Does this mortgage or loan include any re-mortgage?

1 Yes

2 No

END OF FILTER

END OF FILTER

*IF (mortgage status = [new mortgage, additional mortgage taken out since last interview, previous mortgage that was missed at last interview]) OR (whether has same mortgage = yes)*  
*[(HoDMSt = 2 , 3, 4) OR (HoMSam = 1)]*

**HOMFV1N TO HOMFV5N\***

At the moment, is this mortgage or loan fixed or variable rate?

1 Fixed rate

2 Variable rate

**HOVML1N TO HOVML5N\***

[^How / Not including the value of his/her endowment, how] much [^do you / does [^name]] currently owe on this mortgage or loan?

INTERVIEWER: Please check that the correct number of zeros has been entered.

Range: 0..9999997

*IF amount owes on mortgage or loan = RESPONSE*

*[HoVml = RESPONSE]*

*[CHECK HO18] SIGNAL: IF amount currently owed on mortgage or loan > 500000*

*[HoVml > 500000]*

INTERVIEWER: Are you sure? £[^HOVml] seems high - please check.

*ELSE IF amount owes on mortgage or loan = NONRESPONSE [HoVml = NONRESPONSE]*

**HOVMB\***

Is it less than [^10000 / 25000 / 50000 / 250000 pounds], more than [^10000 / 25000 / 50000 / 250000 pounds] or what?

**[Bracket results are recoded in HOVMLL1N, HOVMLU1N HOVMLE1N, HOVMLR1N TO HOVMLL5N, HOVMLU5N HOVMLE5N, HOVMLR5N]**

END OF FILTER

*IF (type of mortgage or loan = [endowment mortgage, part repayment part endowment])*

*[ (HoMty IN [2,,3])]*

**HOVE1N to HOVE5N\***

What is the current value of [^your / [^name's]] endowment?

Range: 0..9999997



**[CHECK HO19] SIGNAL:** IF current value of endowment > 500000 [HoVe > 500000]

INTERVIEWER: Are you sure? £[^HOVe] seems high - please check.

IF (current value of endowment = DONT KNOW) OR (current value of endowment = RF)

[HoVe = DONT KNOW OR HoVe = RF]

**HOVEB\***

Is it less than [^10000 / 25000 / 50000 / 250000 pounds], more than [^10000 / 25000 / 50000 / 250000 pounds] or what?

**[Bracket results are recoded in HOVEL1N, HOVEU1N, HOVEE1N, HOVER1N TO HOVEL5N, HOVEU5N, HOVEE5N, HOVER5N]**

END OF FILTER

END OF FILTER

IF how occupies accommodation = buying with the help of a mortgage OR shared ownership

[HoTenu= 2, 3]

**HOYML1N TO HOYML5N\***

How many years does this mortgage or loan have left to run?

Range : 0..50

**[CHECK HO20] SIGNAL:** IF (number of years left on mortgage > ((30 + year bought accommodation) – year of the interview )) [HoYml > 30 + HoYear - QInit.FWYear]

INTERVIEWER: This figure seems high. Please check.

END OF FILTER

END OF FILTER

**HOMADD\***

Thinking about the mortgage(s) that [^you/name] have just told us about, [^In the last 2 years / since we last interviewed you], have [^you/name] increased the amount of money [^you/name] borrowed on this/these mortgage(s) either by taking out a new mortgage or borrowing more money on an existing mortgage?"

1 Yes

2 No

IF mortgages increased = yes

[HoMadd = yes]

**HOMA\***

In total how much additional money did [^you/name] borrow?

INTERVIEWER: Please only count the additional money borrowed, NOT the total value of the mortgage.

Range : 0..500000



IF (additional mortgage amount = DONT KNOW) OR (additional mortgage amount = RF)

[(HoMa = DONT KNOW) OR (HoMa = RF)]

**HOMAB\***

Would it be less than [<sup>^</sup>50000 / 75000 / 125000 / 500000 pounds], more than [<sup>^</sup>50000 / 75000 / 125000 / 500000 pounds] or what?

**[Bracket maximum and minimum results are recoded in HOMAL, HOMAU, HOMAE, HOMAR]**

END OF FILTER

**HOMU\***

What did [<sup>^</sup>you/name] use the additional funds for?

PROBE : What else?

CODE ALL THAT APPLY.

- 1 Home extensions
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods
- 5 Other (please specify)

**[Code 5 out of possible 5 responses]**

Description	Variable	Archive
Home extensions	Homu1	Homuhe
Home improvements	Homu2	Homuhi
Car purchase	Homu3	Homucp
Other consumable goods	Homu4	Homuoc
Other (please specify)	Homu5	Homu95

IF use of funds = other

[HoMU = other specify]

**HOMUO\***

What did [<sup>^</sup>you/<sup>^</sup>name]] use the additional funds for?

STRING[60]

**[Open responses to HOMUO are coded and where possible merged with the multiple responses to HOMU, n variables HOMUMHE HOMUMHI HOMUMCP HOMUMOC HOMUM85 and HOMUM86]**

END OF FILTER

IF additional fund use = more than one answer

[HoMu = (HoMu.CARDINAL > 1)]

**HOMUM\***

What was the main reason for borrowing additional funds - that is, what was most of the money spent on?

- 1 Home extensions
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods

5 Other (as specified in HOMUO)

END OF FILTER

END OF FILTER

#### HOMREP\*

How much are [<sup>^</sup>your/name's] monthly repayments for [<sup>^</sup>BLANK/all] [<sup>^</sup>you/name's] mortgage(s) or loan(s) outstanding on this property, including [the interests and premiums on <sup>^</sup>[your/name's] endowments and/any] insurance premiums?"

Range : 0..99997

*IF monthly repayments = DK or RF*

*[HoMRep = DK or RF]*

#### HOMREPB\*

Would it be less than [<sup>^</sup>50000 / 75000 / 125000 / 500000 pounds], more than [<sup>^</sup>50000 / 75000 / 125000 / 500000 pounds] or what?

***[Bracket maximum and minimum results are recoded in HOMREPL  
HOMREPU HOMREPE HOMREPR]***

END OF FILTER

#### HOINC\*

Does this repayment include any of the following...

INTERVIEWER: Read out each in turn.

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

***[Code maximum 5 out of 5 possible responses]***

Description	Variable	Archive
A mortgage protection policy	HoInc1	HOINCPP
Buildings insurance	HoInc2	HOINCBI
Contents or possessions insurance	HoInc3	HOINCPI
Other extra payments	HoInc4	HOINC95 <i>(previously archived as 'HOINCOT')</i>
None of these	HoInc96	HOINC96

***[CHECK HO21] CHECK: IF (items included in repayment = none) AND (items included in repayment = at least one other item) [HoInc = 96 AND HoInc = 1...4]  
INTERVIEWER: 'None' is an exclusive code at this question. Please change!***

***IF (items included in repayment = other) AND ((Whether post-interview editing question <> yes) OR (items included in repayment = EMPTY OR (items included in repayment = Other)))***

[HoInc = 4 AND EditQre <> 1 OR HoIncZ = EMPTY OR HoIncZ = 4]

**HOINCE\***

What else does [^your / ^name's]] repayment include?

WRITE IN

String 60

**Open responses to HOINCE are coded and where possible merged with the multiple responses to HOINC in variables:**

Description	Variable	Archive
A mortgage protection policy	HoIncM1	HOINCMPP
Buildings insurance	HoIncM2	HOINCMBI
Contents or possessions insurance	HoIncM3	HOINCMPI
Other answer - not codeable 01 to 03	HoIncM85	HOINCM85
Irrelevant response - not codeable 01 to 03	HoIncM86	HOINCM86
None of these	HoIncM96	HOINCM96

END OF FILTER

**[CHECK HO22] CHECK:** IF (items included in repayment = none) AND (items included in repayment = at least one other item) [HoIncZ = 96 AND HoIncZ = 1...86]  
**EDITOR:** 'None' is an exclusive code at this question. Please change!

IF (((items included in repayment = mortgage protection policy ) OR (items included in repayment = building insurance)) OR (items included in repayment = contents insurance)) OR (items included in repayment = other extra payments) [(((HoInc = 1) OR (HoInc = 2)) OR (HoInc = 3)) OR (HoInc = 4)]

**HOINCC\***

How much of [^your / ^name's]] monthly repayment is for those additional items?

Range: 0..9997

END OF FILTER

IF (number of outstanding mortgages = 1) and (is this a remortgage = no\_ and (increased mortgage since last interview = no or no response) and (ever taken out additional mortgages or loans (last int) = NA, DK, Ref, new partner, NO) [(HoOutM = 1) AND (QMort[1].HoRmo = No) AND (HoMadd = No OR HoMadd <> RESPONSE) AND (ff\_HoEvRe = 9991, 9998, 9999, empty OR 2)]

**HOEVRE\***

Not including [^your / ^name's]] original mortgage did [^you / ^name]] ever take out any additional mortgages or loans on this property?

1 Yes

2 No

END OF FILTER

**HOMETSET\***

INTERVIEWER: The Mortgages section is finished.

Please enter <1> here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

END OF FILTER

**ANYENDOW**

Computed: Whether respondent has an endowment mortgage

- 1 Yes
- 2 No

**HOCTA\***

How much Council Tax [<sup>^</sup>do you / does [<sup>^</sup>name] / does your household / does [<sup>^</sup>name's] household] currently pay?

INTERVIEWER: Code how answer given.

- 1 Annual amount
- 2 Instalment
- 3 Percentage
- 4 Does not pay Council Tax

*IF payment of council tax - annual amount of instalment reported = annual amount*  
[HoCTA = 1]

**HOCTY\***

INTERVIEWER: Enter annual amount.

Range: 0..9997

*IF (annual amount of council tax = DONT KNOW) OR (annual amount of council tax = RF)*

[*(HoCTY = DONT KNOW) OR (HoCTY = RF)*]

**HOCTYB\***

Is it less than [<sup>^</sup>500 / 750 / 1000 / 2000 pounds], more than [<sup>^</sup>500 / 750 / 1000 / 2000 pounds] or what?

**[Bracket results are recoded in HOCTYL HOCTYU HOCTYE HOCTYR]**

END OF FILTER

*ELSE IF payment of council tax - annual amount of instalment reported = instalment*  
[HoCTA = 2]

**HOCTI\***

INTERVIEWER: Enter amount of instalment.

Range: 0..9997

*IF (amount council tax instalment = DONT KNOW) OR (amount council tax instalment = RF)*

[*(HOCTI = DONT KNOW) OR (HOCTI = RF)*]

**HOCTLB\***

Is it less than [<sup>^</sup>50 / 75 / 100 / 200 pounds], more than [<sup>^</sup>50 / 75 / 100 / 200 pounds] or what?

**[Bracket results are recoded in HOCTIL, HOCTIU HOCTIE HOCTIR @]**

END OF FILTER

**HOCTN\***

How many instalments are there, over the whole year?

Range: 1..50

END OF FILTER

*IF payment of council tax - annual amount of instalment reported <> does not pay*

*Council Tax*  
*[HoCTA <> 4]*

**HOCTB\***

*[^Are you / Is [^name]] allowed Council Tax benefit or rebate, to help pay*  
*[^your / his / her] Council Tax?*

- 1 Yes
- 2 No

*IF whether allowed benefit or rebate to help pay council tax = yes*

*[HoCTB = 1]*

**HOCTBA\***

*How much was allowed?*  
*Range: 0..9997*

*IF (whether allowed benefit or rebate to help pay council tax = DONT*  
*KNOW) OR (whether allowed benefit or rebate to help pay council tax = RF)*  
*[(HoCTBA = DONT KNOW) OR (HoCTBA = RF)]*

**HOCTBAB\***

*Was it less than [^50 / 75 / 100 / 200 pounds], more than [^50 / 75 / 100 /*  
*200 pounds] or what?*

***[Bracket results are recoded in HOCTBAL HOCTBAU HOCTBAE***  
***HOCTBAR @]***

END OF FILTER

**HOCTBP\***

- What period did this cover?*
- 01 One week
  - 02 Two weeks
  - 03 Three weeks
  - 04 Four weeks
  - 05 Calendar month
  - 07 Two Calendar months
  - 08 Eight times a year
  - 09 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)

END OF FILTER

*IF (payment of council tax = [annual amount, instalments]) AND (household size = 1)*  
*[(HoCTA = [1, 2]) AND (HHTot = 1)]*

**HODISC\***

[^Did / In addition to [^your / ^name's] benefit, did] [^you / ^name]] receive a 25% single person discount in relation to Council Tax?

- 1 Yes
- 2 No

END OF FILTER

END OF FILTER

**HOSW\***

How much did [^you / name] pay for water and sewerage charges in the last year, that is since [^date a year ago]?

Range: 0..9997

*[CHECK HO23] SIGNAL: IF amount paid for water and sewerage in past year > 1500 [HoSW > 1500]*

*INTERVIEWER: Are you sure? Rates are normally below £30 a week.*

*IF (amount paid for water and sewerage in past year = DONT KNOW) OR (amount paid for water and sewerage in past year = RF)  
[(HoSW = DONT KNOW) OR (HoSW = RF)]*

**HOSWB\***

Was it less than [^50 / 100 / 200 / 500 pounds], more than [^50 / 100 / 200 / 500 pounds] or what?

***[Bracket results are recoded in HOSWL HOSWU HOSWE HOSWR @]***

END OF FILTER

*IF NOT (how occupies accommodation = [rent free, squatting, own it outright]) AND (at least one person named at HoWHN is eligible for interview = yes)  
[NOT (HoTenu = [5, 6, 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 / ^name] has] had difficulties paying for [^your / his / her] accommodation?

- 1 Yes
- 2 No

**HODIFFT\***

In the last 12 months [^have you / has [^name]] ever found [^yourself / himself / herself] more than two months behind with [^your / his / her] [^rent / mortgage / mortgage and 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

END OF FILTER

**HORET\***

INTERVIEWER: ASK OR CODE.

Some accommodation is only available to people over a certain age (usually 55 or 60). This is sometimes called 'retirement housing'. Is [<sup>^</sup>your / [<sup>^</sup>name's]] home retirement housing?

INTERVIEWER: IF THE RESPONDENT SEEMS UNSURE, CODE NO.

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

*IF whether interviewing at same address as last time <> yes*

*[DhSameH <> 1]*

**HORMOV\***

People move for many different reasons. In general terms, what were the reasons [<sup>^</sup>you/[<sup>^</sup>Name]] moved home?

INTERVIEWER: PROBE FULLY.

CODE ALL THAT APPLY.

- 01 Job relocated
- 02 Moved to start a new job
- 03 Moved to a better area, or one with fewer problems
- 04 Moved to a more suitable home
- 05 Bought own home
- 06 Was evicted, couldn't afford to pay rent or had home repossessed
- 07 Moved for health reasons
- 08 Moved in with partner
- 09 Split from partner
- 10 Moved in with family or friends
- 11 Moved to be nearer family and / or friends
- 12 Other financial reason such as to release capital or couldn't afford to run house
- 95 Other reason (Please specify)

*[code maximum 13 out of 13 possible responses]*

Description	Variable	Archive
Job relocated	Hormov1	Hormvjr
Moved to start a new job	Hormov2	Hormvnj
Moved to a better area, or one with fewer problems	Hormov3	Hormvba
Moved to a more suitable home	Hormov4	Hormvms
Bought own home	Hormov5	Hormvbo
Was evicted, couldn't afford to pay rent or had home repossessed	Hormov6	Hormver
Moved for health reasons	Hormov7	Hormvhr
Moved in with partner	Hormov8	Hormvpn
Split from partner	Hormov9	Hormvsp
Moved in with family or friends	Hormov10	Hormvif
Moved to be nearer family and / or friends	Hormov11	Hormvnf

Other financial reason such as to release capital or couldn't afford to run house	Hormov12	Hormvof
Other reason (Please specify)	Hormov95	Hormv95

*IF reasons moved house = other*  
*[HoRMov = 95]*

**HORMOVO**

INTERVIEWER: Please specify the other reason.  
String 80

***Open responses to HORMOVO are coded and where possible merged with the multiple responses to HORMOV in variables:***

Description	Variable	Archive
Job relocated	Hormovm1	Hormvmjr
Moved to start a new job	Hormovm2	Hormvmnj
Moved to a better area, or one with fewer problems	Hormovm3	Hormvmmba
Moved to a more suitable home	Hormovm4	Hormvmms
Bought own home	Hormovm5	Hormvmbo
Was evicted, couldn't afford to pay rent or had home repossessed	Hormovm6	Hormvmer
Moved for health reasons	Hormovm7	Hormvmhr
Moved in with partner	Hormovm8	Hormvmpn
Split from partner	Hormovm9	Hormvmosp
Moved in with family or friends	Hormovm10	Hormvmif
Moved to be nearer family and / or friends	Hormovm11	Hormvmnf
Other financial reason such as to release capital or couldn't afford to run house	Hormovm12	Hormvmof
Home poor condition or demolished	Hormovm13	Hormvmipc
Moved to nursing home	Hormovm14	Hormvmnh
Moved abroad	Hormovm15	Hormvmab
Other answer - not codeable	Hormovm85	Hormvm85
Irrelevant response - not codeable	Hormovm86	Hormvm86

END OF FILTER

*IF more than one reason why moved house*  
*[HoRMov.CARDINAL > 1]*

**HORMAIN**

What was your main reason for moving home?

- 01 [^Job relocated]
- 02 [^Moved to start a new job]
- 03 [^Moved to a better area, or one with fewer problems]
- 04 [^Moved to a more suitable home]
- 05 [^Bought own home]
- 06 [^Was evicted, couldn't afford to pay rent or had home repossessed]
- 07 [^Moved for health reasons]
- 08 [^Moved in with partner]
- 09 [^Split from partner]
- 10 [^Moved in with family or friends]
- 11 [^Moved to be nearer family and/or friends]



12 [^Other financial reason such as to release capital or couldn't afford to run house]

95 [^Other reason (Please specify)]

*IF main reason moved house = new home more suitable*

*[HoRMain = 4]*

**HORMOVA**

In what way is your new home more suitable?

INTERVIEWER: Probe fully.

CODE ALL THAT APPLY.

1 Smaller

2 Larger

3 Fewer maintenance problems

4 More suitable given respondent's health problems

5 Other reason (Please specify)

***[code maximum 5 out of 5 possible responses]***

Description	Variable	Archive
Smaller	Hormova1	Hormosm
Larger	Hormova2	Hormola
Fewer maintenance problems	Hormova3	Hormofp
More suitable given respondent's health problems	Hormova4	Hormosh
Other reason (Please specify)	Hormova5	Hormoot

*IF reasons why new home more suitable = other*

*[HoRMova = 5]*

**HORMOV B**

INTERVIEWER: Please specify the other reason

String 360

***[Open responses to HORMOV B are coded and where possible merged with the multiple responses to HORMOVA]***

Description	Variable	Archive
Smaller	Hormovam1	Hormomsm
Larger	Hormovam2	Hormomla
Fewer maintenance problems	Hormovam3	Hormomfp
More suitable given respondent's health problems	Hormovam4	Hormomsh
No stairs/ground floor	Hormovam6	Hormomns
Better quality	Hormovam7	Hormombq
Better area/more convenient location	Hormovam8	Hormomba
Other answer - not codeable 01 to 04	Hormovam85	Hormom85
Irrelevant response - not codeable 01 to 04	Hormovam86	Hormom86

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

IF not ((Same accommodation as last time = yes) and (number of rooms (last int) = response))

[IF NOT(QHD.DhSameH = Yes AND ff\_HoRoom = [1..30])]

**HOROOM\***

How many rooms [^do you / does [^name] / does your household / does [^name's household] occupy here, including bedrooms but not counting bathrooms, kitchens and any rooms [^you / he / she] let[^BLANK/s] or sublet[^BLANK/s]?

Range: 1..30

END OF FILTER

IF not ((Same accommodation as last time = yes) and (when built (last int) = response))

[IF NOT(QHD.DhSameH = Yes AND ff\_HoOld = [1..5])]

**HOOID\***

When was this property built?

1 before 1919

2 1919-1944

3 1945-1964

4 1965-1984

5 1985 or later

END OF FILTER

**HOADC\***

**SHOWCARD G7**

Whether [^you/[^name]] [^use/uses] them or not, does [^your/his/her] home have any of the features on this card?

CODE ALL THAT APPLY

INTERVIEWER: PLEASE CODE DRIVEWAYS WIDE ENOUGH FOR A CAR TO PARK IN AS ACCESSIBLE PARKING

01 Wide doorways or hallways

02 Ramps or street level entrances

03 Hand rails

04 Automatic or easy open doors

05 Accessible parking or drop off site

06 Lift (e.g. in a block of flats)

07 Walk in shower (level access or standard shower tray)

08 Over bath shower

96 None of these

Description	Variable	Archive
Wide doorways or hallways	HoAdC1	Hoadcwd
Ramps or street level entrances	HoAdC2	Hoadcrs
Hand rails	HoAdC3	Hoadhr
Automatic or easy open doors	HoAdC4	Hoadcad
Accessible parking or drop off site	HoAdC5	Hoadcap
Lift (e.g. in a block of flats)	HoAdC6	Hoadcli
Walk in shower (level access or standard shower tray)	HoAdC7	Hoadcws
Over bath shower	HoAdC8	Hoadcsh
None of these	HoAdC96	Hoadc96

[CHECK HO24] CHECK: IF special features = None AND any other response

*IF [HOADC=96 AND HOADC= [1..95]]  
'None' is an exclusive code at this question. Please change.*

*IF home adaptation = RESPONSE AND home adaptation <> none of these  
[(HoAdC = RESPONSE) AND NOT(HoAdC = 96)]*

**HOADS\***

Were any of these features installed specially to assist people with physical impairments or health problems?

01 Yes - installed to assist people

02 No

END OF FILTER

**HOADD\***

**SHOWCARD G8**

Some homes have special features to assist people who have physical impairments or health problems. Whether [*^you/^name*] [*^use/uses*] them or not, does [*^your/his/her*] home have any of the features on this card?

PROBE: What others?

CODE ALL THAT APPLY.

01 Stairlift or stair glide

02 Alerting devices, such as button alarms to call for help (because of a fall or health problem)

03 Bed lever / bed rail

04 Hoist

05 Toilet equipment/commode

06 Bath or shower seat

07 Kitchen modifications

08 Any other special feature

96 None of these

Description	Variable	Archive
Stairlift or stair glide	HoAdD1	Hoaddcl
Alerting devices, such as button alarms to call for help (because of a fall or health problem)	HoAdD2	Hoaddad
Bed lever / bed rail	HoAdD3	Hoaddbl
Hoist	HoAdD4	Hoaddho
Toilet equipment/commode	HoAdD5	Hoaddco
Bath or shower seat	HoAdD6	Hoaddbs
Kitchen modifications	HoAdD7	Hoaddkm
Any other special feature	HoAdD8	Hoadd95
None of these	HoAdD96	Hoadd96

*[CHECK HO25] CHECK: IF special features = none of these AND any other response  
IF [HOADD= 96 AND HOADD=[1...95]]*

*'None' is an exclusive code at this question. Please change.*

*IF one or more adaptation mentioned*

*[(idx <9) AND (idx IN HoAdC AND HoAdS=yes) OR (idx >= 9 AND (idx-8 IN HoAdD))]*

**HOAI\***

**SHOWCARD G9**

Who paid for the [*^adaptation*]?

CODE ALL THAT APPLY.

01 Health Service (NHS)

02 Social Services

- 03 [<sup>^</sup>You/<sup>^</sup>name]] or [<sup>^</sup>your/his/her] spouse/partner
- 04 Modification was already in the property
- 05 Landlord/care home/sheltered housing association
- 95 Other

**HOAI is looped for each adaptation mentioned**

**[The Other (95) answers are backcoded in the office and merged with the original answers in corresponding variables with the variable name stem "hoaim" instead of "hoai"]**

Type	Description	Variable	Archive
<i>Wide doorways or hallways</i>	NHS	HoAi1	Hoaiwdhs
	Social services	HoAi2	Hoaiwdss
	Respondent or spouse/partner	HoAi3	Hoaiwdys
	Already in the property	HoAi4	Hoaiwdal
	Landlord/care home/sheltered association	HoAi5	Hoaiwdll
	Other	HoAi95	Hoaiwd95
<i>Ramps or street level entrances</i>	NHS	HoAi6	Hoairshs
	Social services	HoAi7	Hoairsss
	Respondent or spouse/partner	HoAi8	Hoairsys
	Already in the property	HoAi9	Hoairsal
	Landlord/care home/sheltered association	HoAi10	Hoairsll
	Other	HoAi96	Hoairs95
<i>Hand rails</i>	NHS	HoAi11	Hoaihrhs
	Social services	HoAi12	Hoaihrss
	Respondent or spouse/partner	HoAi13	Hoaihrys
	Already in the property	HoAi14	Hoaihral
	Landlord/care home/sheltered association	HoAi15	Hoaihrll
	Other	HoAi97	Hoaihr95
<i>Automatic or easy open doors</i>	NHS	HoAi16	Hoaiadhs
	Social services	HoAi17	Hoaiadss
	Respondent or spouse/partner	HoAi18	Hoaiadys
	Already in the property	HoAi19	Hoaiadal
	Landlord/care home/sheltered association	HoAi20	Hoaiadll
	Other	HoAi98	Hoaiad95
<i>Accessible parking or drop off site</i>	NHS	HoAi21	Hoaiaphs
	Social services	HoAi22	Hoaiapss
	Respondent or spouse/partner	HoAi23	Hoaiapys
	Already in the property	HoAi24	Hoaiapal
	Landlord/care home/sheltered association	HoAi25	Hoaiapll
	Other	HoAi99	Hoaiap95
<i>Lift (e.g. in a block of flats)</i>	NHS	HoAi26	Hoailihs
	Social services	HoAi27	Hoailiss
	Respondent or spouse/partner	HoAi28	Hoailiys
	Already in the property	HoAi29	Hoailial
	Landlord/care home/sheltered association	HoAi30	Hoailill
	Other	HoAi100	Hoaili95
<i>Walk in shower (level access or standard shower tray)</i>	NHS	HoAi31	Hoaiwshs
	Social services	HoAi32	Hoaiwsss
	Respondent or spouse/partner	HoAi33	Hoaiwsys
	Already in the property	HoAi34	Hoaiwsal
	Landlord/care home/sheltered association	HoAi35	Hoaiwsll
	Other	HoAi101	Hoaiws95

<i>Over bath shower</i>	NHS	HoAi36	Hoaislhs
	Social services	HoAi37	Hoaisshs
	Respondent or spouse/partner	HoAi38	Hoaishts
	Already in the property	HoAi39	Hoaishal
	Landlord/care home/sheltered association	HoAi40	Hoaislll
	Other	HoAi102	Hoais95
<i>Stairlift or stair glide</i>	NHS	HoAi41	Hoaiclhs
	Social services	HoAi42	Hoaiclss
	Respondent or spouse/partner	HoAi43	Hoaiclys
	Already in the property	HoAi44	Hoaiclal
	Landlord/care home/sheltered association	HoAi45	Hoaiclll
	Other	HoAi103	Hoaicl95
<i>Alerting devices, such as button alarms to call for help (because of a fall or health problem)</i>	NHS	HoAi46	Hoaidvhs
	Social services	HoAi47	Hoaidvss
	Respondent or spouse/partner	HoAi48	Hoaidvys
	Already in the property	HoAi49	Hoaidval
	Landlord/care home/sheltered association	HoAi50	Hoaidvll
	Other	HoAi104	Hoaidv95
<i>Bed lever / bed rail</i>	NHS	HoAi51	Hoaihlhs
	Social services	HoAi52	Hoaihlss
	Respondent or spouse/partner	HoAi53	Hoaihblys
	Already in the property	HoAi54	Hoaihlal
	Landlord/care home/sheltered association	HoAi55	Hoaihl ll
	Other	HoAi105	Hoaihl95
<i>Hoist</i>	NHS	HoAi56	Hoaihohs
	Social services	HoAi57	Hoaihoss
	Respondent or spouse/partner	HoAi58	Hoaihoys
	Already in the property	HoAi59	Hoaihoal
	Landlord/care home/sheltered association	HoAi60	Hoaiholl
	Other	HoAi106	Hoaiho95
<i>Toilet equipment/ commode</i>	NHS	HoAi61	Hoaicohs
	Social services	HoAi62	Hoaicoss
	Respondent or spouse/partner	HoAi63	Hoaiccoys
	Already in the property	HoAi64	Hoaiccoal
	Landlord/care home/sheltered association	HoAi65	Hoaicoll
	Other	HoAi107	Hoaic95
<i>Bath or shower seat</i>	NHS	HoAi66	Hoaihs
	Social services	HoAi67	Hoaihs
	Respondent or spouse/partner	HoAi68	Hoaihs
	Already in the property	HoAi69	Hoaihs
	Landlord/care home/sheltered association	HoAi70	Hoaihs
	Other	HoAi108	Hoaihs
<i>Kitchen modifications</i>	NHS	HoAi71	Hoaihmhs
	Social services	HoAi72	Hoaihmss
	Respondent or spouse/partner	HoAi73	Hoaihmys
	Already in the property	HoAi74	Hoaihma
	Landlord/care home/sheltered association	HoAi75	Hoaihmll
	Other	HoAi109	Hoaihm95
<i>Any other special feature</i>	NHS	HoAi76	Hoaioths

	Social services	HoAi77	Hoaiotss
	Respondent or spouse/partner	HoAi78	Hoaiotys
	Already in the property	HoAi79	Hoaiotal
	Landlord/care home/sheltered association	HoAi80	Hoaiotll
	Other	HoAi110	Hoaiot95

IF who paid for adaptation = other

[HOAI = 95]

**HOAIO\***

INTERVIEWER: Please specify

END OF FILTER

IF who paid for adaptation <> modification already in the property [HOAI<>4]

**HOAIB\***

Can I just check that [**organisation who paid**] covered all the costs of the [**adaptation**]?

01 Yes covered all costs

02 No

**[CHECK HO26] CHECK: IF (HoAiB = No) THEN CHECK: ERROR**

Please go back to HoAi and add who else paid for the ^adaptation[idx].

END OF FILTER

END OF FILTER

**HOPROB\***

**SHOWCARD G10**

Does [**your / ^name's**] accommodation have any of these problems?

PROBE: What others?

CODE ALL THAT APPLY.

01 Shortage of space

02 Noise from neighbours

03 Other street noise, such as traffic, businesses, factories

04 Too dark, not enough light

05 Pollution, grime or other environmental problems caused by traffic or industry

06 Rising damp in floors and walls

07 Water getting in from roof, gutters or windows

08 Bad condensation problem

09 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

**[code maximum 14 out of 14 possible responses]**

Description	Variable	Archive
Shortage of space	HoProb1	Hopros
Noise from neighbours	HoProb2	Hopronz
Other street noise, such as traffic, businesses, factories	HoProb3	Hoprosn
Too dark, not enough light	HoProb4	Hoprodk
Pollution, grime or other environmental problems caused by traffic or industry	HoProb5	Hopropropo

Rising damp in floors and walls	HoProb6	Hoprord
Water getting in from roof, gutters or windows	HoProb7	Hoprowa
Bad condensation problem	HoProb8	Hoprocp
Problems with electrical wiring or plumbing	HoProb9	Hoproep
General rot and decay	HoProb10	Hoproro
Problems with insects, mice or rats	HoProb11	Hoproin
Too cold in winter	HoProb12	Hoproco
Other problems	HoProb95	Hopro95
None of these	HoProb96	Hopro96

*[CHECK HO27] CHECK: IF (problems accommodation has = none) AND (problems accommodation has = at least one other item) [HoProb = 96 AND HoProb = 1...95] 'None' is an exclusive code at this question. Please change!*

*IF (problems accommodation has = other) AND ((whether post-interview editing question <> yes) OR (problems accommodation has = EMPTY OR (problems accommodation has = other)))  
 [(HoProb = 95) AND ((EditQre <> 1) OR (HoProZ = EMPTY OR (HoProZ = 95)))]*

**HOPROBO\***

INTERVIEWER: ENTER OTHER PROBLEMS

String 40

**[Open responses to HOPROBO are coded and where possible merged with the multiple responses to HOPROB]**

Description	Variable	Archive
Shortage of space	HoProM1	Hopromsp
Noise from neighbours	HoProM2	Hopromnz
Other street noise, such as traffic, businesses, factories	HoProM3	Hopromsn
Too dark, not enough light	HoProM4	Hopromdk
Pollution, grime or other environmental problems caused by traffic or industry	HoProM5	Hoprompo
Rising damp in floors and walls	HoProM6	Hopromrd
Water getting in from roof, gutters or windows	HoProM7	Hopromwa
Bad condensation problem	HoProM8	Hopromcp
Problems with electrical wiring or plumbing	HoProM9	Hopromep
General rot and decay	HoProM10	Hopromro
Problems with insects, mice or rats	HoProM11	Hopromin
Too cold in winter	HoProM12	Hopromco
Vandalism/graffiti	HoProM51	Hopromva
Structural problems	HoProM52	Hopromst
Problems with parking		
Problems with litter, rubbish or fly-tipping		
Other answer - not codeable	HoProM85	Hoprom85
Irrelevant answer - not codeable	HoProM86	Hoprom86
None of these	HoProM96	Hoprom96

END OF FILTER

**HOHAVE\***

**SHOWCARD G11**

At the present time, [*^do you / does [^name] / does your household / does [^name's] household*] have any of the following items?

PROBE: What others?

CODE ALL THAT APPLY.

INTERVIEWER: Items that are provided communally may be included.

- 01 Television
- 02 Deep freeze or fridge freezer (exclude fridge only)
- 03 Washing machine
- 04 Tumble Dryer / Washer - Dryer
- 05 Dish washer
- 06 Computer / Tablet
- 07 Phone (landline)
- 95 All of these
- 96 None of these

**[code maximum 12 out of 14 possible responses]**

Description	Variable	Archive
Television	HoHave1	Hohavtv
Deep freeze or fridge freezer (exclude fridge only)	HoHave2	Hohavff
Washing machine	HoHave3	Hohavwm
Tumble Dryer / Washer - Dryer	HoHave4	Hohavwd
Dish washer	HoHave5	Hohavdw
Computer	HoHave7	Hohavpc
Phone (landline)	HoHave9	Hohavph
All of these	HoHave95	Hohav95
None of these	HoHave96	Hohav96

*IF household items = none*

*[HoHave = 96]*

**[CHECK HO28] CHECK:** IF (items household has = none) AND (items household has = at least one other code) [HoHave= 96 AND HoHave = 1...95]  
'None' is an exclusive code at this question. Please change!

**[CHECK HO29] CHECK:** IF items household has = all [HoHave = 95]

CHECK: (items household has = all) AND (items household has = at least one other code) [HoHave = 95 AND HoHave = 1...96]

'All of these' is an exclusive code at this question. Please change!

END OF FILTER

*IF (household items = RESPONSE) AND NOT (household items = none)*

*[(HoHave = RESPONSE) AND NOT (HoHave = 96)]*

**HOHAVB\***

**SHOWCARD G11**

Did [*^you / ^name / your household / ^name's household*] buy the item / any of the items you've just mentioned in the last two years, that is since [*^date two years ago*]? [*^BLANK / Please only include equipment that you have bought. Do not include subscriptions, call costs or line rental.*]

PROBE: What others?

CODE ALL THAT APPLY.

INTERVIEWER: Do not code if communally provided.

- 01 [*^Television*]
- 02 [*^Deep freeze or fridge freezer (exclude fridge only)*]
- 03 [*^Washing machine*]
- 04 [*^Tumble Dryer / Washer Dryer*]
- 05 [*^Dish washer*]



- 06 [^Computer / Tablet]
- 07 [^Phone (landline)]
- 95 [^All of these]
- 96 [^None of these]

*[code maximum 12 out of 14 possible responses]*

Description	Variable	Archive
Television	HoHaveB1	Hohavbtv
Deep freeze or fridge freezer (exclude fridge only)	HoHaveB2	Hohavbff
Washing machine	HoHaveB3	Hohavbwm
Tumble Dryer / Washer - Dryer	HoHaveB4	Hohavbwd
Dish washer	HoHaveB5	Hohavbdw
Computer	HoHaveB7	Hohavbpc
Phone (landline)	HoHaveB9	Hohavbph
All of these	HoHaveB95	Hohavb95
None of these	HoHaveB96	Hohavb96

*[CHECK HO30] CHECK: If at HOHAVB mentions that they bought an item in the last two years that was not mentioned as one of the items they currently have  
If [HohaveB<>HoHAvE]  
Code ^k was not selected at HoHave. Remove this code from HoHavB or return to HoHave and enter code ^k.*

*IF (household items bought in past two years = television) OR (household items bought in past two years = all)  
[(HoHavB = 1) OR (HoHavB = 95)]*

**HOHV01\***

How much in total did [^you / ^name] / your household / [^name's] household pay for the [^Television] excluding any interest paid on loans?  
INTERVIEWER: Write in to nearest £. Accept approximate amount.  
If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.  
Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

*[CHECK HO31] SIGNAL: IF amount paid > 2000 [HoHV > 2000]  
INTERVIEWER: Are you sure? £[^HoHV[1]] seems high - please check.*

*IF interest paid in total = NONRESPONSE  
[HoHV01 = NONRESPONSE]*

**HOHVB\***

Was it less than [^100 / 200 / 500 / 1000 pounds], more than [^100 / 200 / 500 / 1000 pounds] or what?

*[Bracket results are recoded in HOHV01L HOHV01U HOHV01E HOHV01R]*

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = deep freeze or fridge freezer (exclude fridge only)) OR (household items bought in past two years = all) [(HoHavB = 2) OR (HoHavB = 95)]*

**HOHV02\***

How much in total did [^you / ^name] / your household / [^name's] household pay for the [^Deep freeze or fridge freezer (exclude fridge only)] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

*[CHECK HO32] SIGNAL: If amount paid > 2000 [HoHV > 2000]*

*INTERVIEWER: Are you sure? £[^HoHV[2]] seems high - please check.*

*IF paid in total = NONRESPONSE*

*[HoHV02 = NONRESPONSE]*

**HOHVB\***

Was it less than [^75 / 150 / 300 / 500 pounds], more than [^75 / 150 / 300 / 500pounds] or what?

**[Bracket results are recoded in HOHV02L HOHV02U HOHV02E HOHV02R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = washing machine) OR (household items bought in past two years = all) [(HoHavB = 3) OR (HoHavB = 95)]*

**HOHV03\***

How much in total did [^you / ^name] / your household / [^name's] household pay for the [^washing machine] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

*[CHECK HO33] SIGNAL: IF amount paid > 2000 [HoHV > 2000]*

*INTERVIEWER: Are you sure? £[^HoHV[3]] seems high - please check.*

*IF paid in total = NONRESPONSE*

*[HoHV03 = NONRESPONSE]*

**HOHVB\***

Was it less than [^150 / 250 / 350 / 500 pounds], more than [^150 / 250 / 350 / 500 pounds] or what?

**[Bracket results are recoded in HOHV03L HOHV03U HOHV03E HOHV03R**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = Tumble Dryer / Washer - Dryer) OR  
(household items bought in past two years = all)  
[(HoHavB = 4) OR (HoHavB = 95)]*

**HOHV04\***

How much in total did [*^you / ^name / your household / ^name's household*] pay for the [*^Tumble Dryer / Washer Dryer*] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

*[CHECK HO34] SIGNAL: IF amount paid > 2000 [HoHV > 2000]*

*INTERVIEWER: Are you sure? £[*^HoHV[4]*] seems high - please check.*

*IF paid in total = NONRESPONSE*

*[HoHV04 = NONRESPONSE]*

**HOHVB\***

Was it less than [*^100 / 200 / 300 / 500 pounds*], more than [*^100 / 200 / 300 / 500 pounds*] or what?

**[Bracket results are recoded in HOHV04L HOHV04U HOHV04E HOHV04R]**

END OF FILTER

END OF FILTER

*IF (household items bought in past two years = dish washer) OR (household items  
bought in past two years = all)  
[(HoHavB = 5) OR (HoHavB = 95)]*

**HOHV05\***

How much in total did [*^you / ^name / your household / ^name's household*] pay for the [*^Dish washer*] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

*[CHECK HO35] SIGNAL: IF amount paid > 2000 [HoHV > 2000]*

*INTERVIEWER: Are you sure? £[*^HoHV[5]*] seems high - please check.*

IF paid in total = NONRESPONSE  
[HoHV05 = NONRESPONSE]

**HOHVB\***

Was it less than [^150 / 250 / 350 / 500 pounds], more than [^100 / 250 / 350 / 500 pounds] or what?

**[Bracket results are recoded in HOHV05L HOHV05U HOHV05E HOHV05R]**

END OF FILTER

END OF FILTER

IF (household items bought in past two years = microwave oven) OR (household items bought in past two years = all)  
[(HoHavB = 6) OR (HoHavB = 95)]

**HOHV06\***

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^Microwave oven] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO36] SIGNAL: IF amount paid > 2000 [HoHV > 2000]**

**INTERVIEWER: Are you sure? £[^HoHV[6]] seems high - please check.**

IF paid in total = NONRESPONSE  
[HoHV06 = NONRESPONSE]

**HOHVB\***

Was it less than [^50 / 100 / 200 / 400 pounds], more than [^50 / 100 / 200 / 400 pounds] or what?

**[Bracket results are recoded in HOHV06L HOHV06U HOHV06E HOHV06R]**

END OF FILTER

END OF FILTER

IF (household items bought in past two years = computer) OR (household items bought in past two years = all)  
[(HoHavB = 7) OR (HoHavB = 95)]

**HOHV07\***

How much in total did [^you / [^name] / your household / [^name's] household] pay for the [^Computer / Tablet] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred

to future collect retail price excluding interest on loan etc.  
Range: 0..9997

**[CHECK HO37] SIGNAL:** IF amount paid > 2000 [HoHV > 2000]  
*INTERVIEWER: Are you sure? £[^HoHV[7]] seems high - please check*

IF paid in total = NONRESPONSE  
[HoHV07 = NONRESPONSE]

**HOHVB\***

Was it less than [^500 / 750 / 1000 / 2000 pounds], more than [^500 / 750 / 1000 / 2000 pounds] or what?

**[Bracket results are recoded in HOHV07L HOHV07U HOHV07E HOHV07R]**

END OF FILTER

END OF FILTER

IF (household items bought in past two years = On-line digital / Satellite / Cable Television) OR (household items bought in past two years = all)  
[(HoHavB = 8) OR (HoHavB = 95)]

**HOHV08\***

How much in total did [^you / ^name] / your household / [^name's] household pay for the [^On-line digital / Satellite / Cable Television] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

**[CHECK HO38] SIGNAL:** IF amount paid > 2000 [HoHV > 2000]  
*INTERVIEWER: Are you sure? £[^HoHV[8]] seems high - please check*

IF paid in total = NONRESPONSE  
[HoHV08 = NONRESPONSE]

**HOHVB**

Was it less than [^50 / 100 / 200 / 400 pounds], more than [^50 / 100 / 200 / 400] or what?

**[Bracket results are recoded in HOHV08L HOHV08U HOHV08E HOHV08R]**

END OF FILTER

END OF FILTER

IF (household items bought in past two years = phone (landline)) OR (HoHavB = all)  
[(HoHavB = 9) OR (HoHavB = 95)]

**HOHV09\***

How much in total did [^you / ^name] / your household / [^name's] household pay for the [^Phone (landline)] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.  
If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.  
Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

**[CHECK HO39] SIGNAL:** IF amount paid > 2000 [HoHV > 2000]  
INTERVIEWER: Are you sure? £[^HoHV[9]] seems high - please check.

IF paid in total = NONRESPONSE  
[HoHV09 = NONRESPONSE]

**HOHVB\***

Was it less than [^15 / 75 / 150 / 200 pounds], more than [^15 / 75 / 150 / 200 pounds] or what?

**[Bracket results are recoded in HOHV9L HOHV9U HOHV9E HOHV9R]**

END OF FILTER

IF (household items bought in past two years = DVD player) OR (HoHavB = all)  
[(HoHavB = 10) OR (HoHavB = 95)]

**HOHV10\***

How much in total did [^you / ^name] / your household / [^name's] household] pay for the [^DVD player / CD player / Video recorder] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.  
If items bought as combined unit / package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.  
Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one. If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

**[CHECK HO40] SIGNAL:** IF amount paid > 2000 [HoHV > 2000]  
INTERVIEWER: Are you sure? £[^HoHV[10]] seems high - please check

IF paid in total = NONRESPONSE  
[HoHV10 = NONRESPONSE]

**HOHVB\***

Was it less than [^75 / 150 / 300 / 500 pounds], more than [^75 / 150 / 300 / 500 pounds] or what?

**[Bracket results are recoded in HOHV10L HOHV10U HOHV10E HOHV10R]**

END OF FILTER

END OF FILTER

IF (household items bought in past two years = digital/personal video recorder) OR  
(household items bought in past two years = all)  
[(HoHavB = 11) OR (HoHavB = 95)]

**HOHV11\***

How much in total did [<sup>^</sup>you / [<sup>^</sup>name] / your household / [<sup>^</sup>name's] household] pay for the [<sup>^</sup>digital/personal video recorder] excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.

Range: 0..9997

*[CHECK HO41] SIGNAL: IF amount paid > 2000 [HoHV > 2000]*

*INTERVIEWER: Are you sure? £[<sup>^</sup>HoHV[11]] seems high - please check*

*IF interest paid in total = NONRESPONSE*

*[HoHV11 = NONRESPONSE]*

**HOHVB\***

Was it less than [<sup>^</sup>75 / 150 / 300 / 500 pounds], more than [<sup>^</sup>75 / 150 / 300 / 500 pounds] or what?

END OF FILTER

END OF FILTER

END OF FILTER

**HOBB**

At the present time do you have an internet connection?

01 Yes

02 No

**HOGREEN\*****SHOWCARD G11a**

I have one more question now about items that [<sup>^</sup>your / [<sup>^</sup>name's] / you and your household's] have.

At the present time, does your household have any of the following items?

*Select all that apply*

1. Solar panels
2. Wind turbines
3. Heat pump
4. Electric car
5. Hybrid car
6. None of these

**HOCO\***

Now I have some questions about [<sup>^</sup>your / [<sup>^</sup>name's] / you and your household's] spending on some other common items. [<sup>^</sup>BLANK / Please include the amount spent by all household members]

INTERVIEWER: Enter <1> to continue



Range: 1..1

### HOFOOD\*

First thinking about [<sup>^</sup>you / [<sup>^</sup>name]] / your household's / [<sup>^</sup>name's] household's weekly food bills, approximately how much [<sup>^</sup>do you / does [<sup>^</sup>name] / does your household / does [<sup>^</sup>name's] household] usually spend in total on food and groceries - include all food, bread, milk, soft drinks, etc and meals on wheels; exclude pet food, alcohol, cigarettes, takeaways and meals out?

INTERVIEWER: Write in to nearest £.

INTERVIEWER: IF ASKED "USUALLY" MEANS ON AVERAGE OVER THE LAST MONTH.

If asked, tell respondent to exclude cleaning products.

Range: 0..9997

*[CHECK HO42] SIGNAL: IF usual amount spent on food per week >300 [HoFood > 300]*

*INTERVIEWER: Are you sure? £[<sup>^</sup>hofood] seems high - please check.*

*IF (usual amount spent on food per week = DONT KNOW)*

*OR (usual amount spent on food per week = RF)*

*[(HoFood = DONT KNOW) OR (HoFood = RF)]*

### HOFOODB\*

Is it usually less than [<sup>^</sup>30 / 50 / 75 / 150 pounds], more than [<sup>^</sup>30 / 50 / 75 / 150 pounds] or what?

**[Bracket results are recoded in HOFOODL HOFOODU HOFOODE HOFOODR]**

END OF FILTER

### HOMEAL\*

Can I just check, in the last 12 months that is since [<sup>^</sup>date a year ago] did [<sup>^</sup>you / [<sup>^</sup>name]] (or anyone else in [<sup>^</sup>your / his / her] household) ever cut the size of your meals or skip meals because there wasn't enough money for food?

1 Yes

2 No

*IF whether cuts size of meals because of lack of money = yes*

*[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?

END OF FILTER

### HOCL\*

The last question about spending is all about how much [<sup>^</sup>you/him/her] actually spent in the last four weeks, whether this was for [<sup>^</sup>you/[<sup>^</sup>Name]] or someone else. Thinking of the last four weeks (since [<sup>^</sup>date four weeks ago]), approximately how much did [<sup>^</sup>you / [<sup>^</sup>name] (or a member of this household)] spend on clothes, including outerwear, underwear, footwear and accessories?

INTERVIEWER: Write in to nearest £.

Range: 0..9997



**[CHECK HO43] SIGNAL:** IF amount spent on clothing in past month > 1000 [HoCl > 1000]

**INTERVIEWER:** Are you sure? £[HoCl] seems high - please check.

IF amount spent on clothing in past month = NONRESPONSE

[HoCl = NONRESPONSE]

**HOCLB\***

Was it less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in HOCLL HOCLU HOCLE HOCLR]**

END OF FILTER

**HOOUTFM**

Again, thinking about the last four week (since [^date]), approximately how much did [^you / [^name] (or a member of this household)] spend in a month in total on takeaways and food consumed out of the home – include all food consumed out of the home e.g. restaurants, meals consumed at the workplace etc.?

**INTERVIEWER:** Write in to nearest £.

Range: 0..9997

IF (usual amount spent every month on eating out = DONT KNOW) OR (usual amount spent every month on eating out = RF)

[(HoOutf = DONT KNOW) OR (HoOutf = RF)]

**HOOUTFMB**

Is it usually less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500pounds] or what?

**[Bracket results are recoded in HOOUTFML HOOUTFMU HOOUTFME HOOUTFMR]**

END OF FILTER

**[CHECK HO44] SIGNAL:** IF usual amount spent every month on eating out > 1000 [HoOutfM > 1000]

**INTERVIEWER:** Are you sure? £[^HoOutfM] seems high - please check.

**HOLEIS\***

**SHOWCARD G12**

Again, thinking of the last four weeks (since [^date four weeks ago]), approximately how much did [^you / [^name] (or a member of this household)] spend on leisure activities, other than eating out, of the kind listed on this card?

**INTERVIEWER:** Write in to nearest £.

The cost of any visits to the cinema, theatre, sports, bingo etc, in the last four weeks (including any expenses whilst out).

Any payments that have been made in the last four weeks on:

- subscriptions to sports and social clubs and societies
- fees for day or evening classes
- subscriptions to the internet, cable or satellite
- TV licences and rentals

Range: 0..9997

**[CHECK HO45] SIGNAL:** IF amount spent on leisure activities in past month > 1000

[HoLeis > 1000]

INTERVIEWER: Are you sure? £[^HoLeis] seems high - please check.

IF amount spent on leisure activities in past month = NONRESPONSE

[HoLeis = NONRESPONSE]

**HOLEISB\***

Was it less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in HOLEISL HOLEISU HOLEISE HOLEISR]**

END OF FILTER

**HOPETROL\***

Thinking of the last four weeks, approximately how much did [^you / ^name] (or a member of this household) spend on petrol? Including holidays and commuting?

Range: 0..9997

**[CHECK HO] SIGNAL: IF amount spent on petrol in past month > 1000 [Hoxxx > 1000]**

INTERVIEWER: Are you sure? £[^Hoxxx] seems high - please check.

IF amount spent on petrol in past month = NONRESPONSE

[HoPETROL] = NONRESPONSE]

**HOPETROLB\***

Was it less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in xxx]**

END OF FILTER

**HOPUTRAN\***

Thinking of the last four weeks, approximately how much did [^you/name] spend on public transport? Including holidays and commuting.

Range: 0..9997

**[CHECK HO] SIGNAL: IF amount spent on public transport in past month > 1000 [HoPUTRAN > 1000]**

INTERVIEWER: Are you sure? £[^Hoxxx] seems high - please check

IF amount spent on public transport in past month = NONRESPONSE

[Hoputran] = NONRESPONSE]

**HOPUTRANB\***

Was it less than [^30 / 50 / 150 / 500 pounds], more than [^30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in xxx]**

END OF FILTER

**HOPRHC\***

In the last 12 months, that is since [^date a year ago], how much did [^you / ^name] (or a member of this household) spend on private health care out of pocket (i.e. excluding regular private medical insurance premiums), including excess for treatment covered by private insurance? Exclude any spending on private dental or eye care.

Range 0...999997

*[CHECK HO] SIGNAL: IF amount spent on private healthcare is greater than £20,000 [HOPRHC>20000]*

*INTERVIEWER: Are you sure? £[^HOPRHC] seems high – please check*

IF HOPRHC= NON RESPONSE

**HOPRHCB**

Was it less than [^500/1000/5000/15000 pounds], more than [^500/1000/5000/15000 pounds] or what?

**[Bracket results are recoded in xxx]**

END OF FILTER

**HOTRAN\*** (Please see user guide for further details regarding this variable)

(And) thinking of the last four weeks (since [^date four weeks ago]) [^BLANK/not including the amount you contributed to a child trust fund], how much money have [^you / ^name] (or a member of this household) given to relatives or other people outside your household, including money to charity?

INTERVIEWER: WRITE IN TO NEAREST £.

Include all donations to charities, all monetary transfers to individuals (when nothing received in return). Do not include lottery.

Range: 0..9997

*[CHECK HO46] SIGNAL: IF amount given to charity and individuals outside household in past month > 1000 [HoTran >1000]*

*INTERVIEWER: Are you sure? £[^HoTran] seems high - please check.*

*IF amount given to charity and individuals outside household in past month =*

*NONRESPONSE*

*[HoTran = NONRESPONSE]*

**HOTRANB\***

Was it less than [^10 / 30 / 50 / 150 / 500 pounds], more than [^10 / 30 / 50 / 150 / 500 pounds] or what?

**[Bracket results are recoded in HOTRANL HOTRANU HOTRANE HOTRANR]**

END OF FILTER

*IF charitable donations <> 0 or non response*

*[((HoTran <> 0) OR (HoTran = NONRESPONSE))]*

**HOTRANW**

Can you tell me who you gave that money to?

CODE ALL THAT APPLY

1 Grandchild(ren)

2 Own child(ren)

3 Other relative

4 Charity

5 Other non-relative

**Multiple responses are recoded in variables:**

Description	Variable	Archive
Grandchild(ren)	HOTRANW1	HOTRANGC
Own child(ren)	HOTRANW2	HOTRANOC
Other relative	HOTRANW3	HOTRANOR
Charity	HOTRANW4	HOTRANCH
Other non-relative	HOTRANW5	HOTRANNR

**LOOP FOR EACH RECIPIENT TYPE**

*IF gave money to more than one type of recipient*  
*[hotranw.cardinal>0]*

**HOTRPA**

We'd like to know how your gift was shared between [*^recipients mentioned at hotranw*]

INTERVIEWER: ENTER WHETHER SPLIT GIVEN AS A PERCENTAGE OR MONETARY AMOUNT

1 Percentage

2 Amount

*IF split of gifts = recorded as percentage*  
*[HOTRPA = percentage]*

**HOTRAP**

What percentage did you give to [*^grandchildren/children/other relatives/charity/other nonrelatives*]?"

RANGE: 0..100

**Multiple responses recoded in variables:**

Description	Variable	Archive
Percentage given to grandchild(ren)	HOTRAP1	hotrapgc
Percentage given to own child(ren)	HOTRAP2	hotrapoc
Percentage given to other relative	HOTRAP3	hotrapor
Percentage given to charity	HOTRAP4	hotrapch
Percentage given to other non-relative	HOTRAP5	hotrapnr

*ELSE IF split of gifts = recorded as amounts [HOTRPA = amount]*

**HOTRAPB**

How much did you give to [*^grandchildren/children/other relatives/charity/other nonrelatives*]?"

RANGE: 0..1999999

**Multiple responses recoded in variables:**

Description	Variable	Archive
Amount given to grandchild(ren)	HOTRAPB1	hotrabgc
Amount given to own child(ren)	HOTRAPB2	hotraboc
Amount given to other relative	HOTRAPB3	hotrabor
Amount given to charity	HOTRAPB4	hotrabch

Amount given to other non-relative	HOTRAPB5	hotrabnr
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END OF FILTER

END OF FILTER

END OF LOOP

**HOCENH\***

[^Do you / Does [^name]] have any form of central heating in [^your / his / her] accommodation?

INTERVIEWER: INCLUDE STORAGE HEATERS.

1 Yes

2 No

*IF whether has central heating = Yes*

*[HoCenH = 1]*

**HOCENP\***

Is the central heating fuelled by ...READ OUT...

INTERVIEWER: Code coal, wood etc. as solid fuel.

1 ...mains gas,

2 electricity,

3 solid fuel,

4 oil,

5 or something else?

END OF FILTER

**HOOHEA\***

[^Do you / Does [^name]] use any other forms of heating such as ...READ OUT...

CODE ALL THAT APPLY.

INTERVIEWER: Do not include if available in the household but not used.

1 ...gas fire,

2 electric fire,

3 paraffin heaters,

4 open fire (log/wood/coal),

95 or something else? (please specify)

96 SPONTANEOUS: No other heating

***[code maximum 5 out of 6 possible responses]***

Description	Variable	Archive
Gas fire	HoOhea1	HOHEAGF
Electric fire	HoOhea2	HOHEAEF
Paraffin heaters	HoOhea3	HOHEAPH
Open fire (log/wood/coal)	HoOhea4	HOHEAOF
Or something else? (please specify)	HoOhea95	HOHEA95
SPONTANEOUS: No other heating	HoOhea96	HOHEA96

***[CHECK HO47] CHECK: IF additional forms of heating used = no other heating AND any other response***

***IF HoOhea=96 AND HOhea= 1..95]***

*INTERVIEWER: 'No other heating' is an exclusive code. Please change!*

*IF (additional forms of heating used = other)*

*[HoOhea = 95]*

**HOOHEO\***

INTERVIEWER: RECORD OTHER TYPE OF HEATING

String 60

***[Open responses to Hooheo are coded and where possible merged with the multiple responses to HOOHEA]***

Description	Variable	Archive
Gas fire	HoOHeM1	HOHEAMGF
Electric fire	HoOHeM2	HOHEAMEF
Paraffin heaters	HoOHeM3	HOHEAMPH
Open fire (log/wood/coal)	HoOHeM4	HOHEAMOF
Bottled gas heaters	HoOHeM7	HoOHeMBG
Other answer - not codeable 01 to 04	HoOHeM85	HOHEAM85
Irrelevant response - not codeable 01 to 04	HoOHeM86	HOHEAM86
SPONTANEOUS: No other heating	HoOHeM96	HOHEAM96

END OF FILTER

**HOFUEL\***

**SHOWCARD G13**

Can I just check, which of these [*^do you/does name*] use in [*^your/his/her*] home, either for heating *or for any other purpose?*

CODE ALL THAT APPLY.

INTERVIEWER: Do not include if available in the household but not used.

- 1 Mains gas
- 2 Electricity
- 3 Coal / Smokeless fuel
- 4 Paraffin / Bottled gas
- 5 Oil
- 6 Wood
- 95 Other source of fuel or power

***[code maximum 7 out of 7 possible responses]***

Description	Variable	Archive
Mains gas	HoFuel1	HOFUELGA
Electricity	HoFuel2	HOFUELEL
Coal / Smokeless fuel	HoFuel3	HOFUELCO
Paraffin / Bottled gas	HoFuel4	HOFUELPA
Oil	HoFuel5	HOFUELOI
Wood	HoFuel6	HOFUELWO
Other source of fuel or power	HoFuel95	HOFUEL95

***[Responses to HOFUELO are merged with responses to HOFUEL and recoded into variables: HOFUEZ1 HOFUEZ2 HOFUEMGA HOFUEMEL HOFUEMCO HOFUEMPA HOFUEMOI HOFUEMWO HOFUEMSO HOFUEM85 HOFUEM86]***

*IF (household fuel = mains gas) AND (household fuel = electricity)*

*[[HoFuel = 1) AND (HoFuel = 2)]*

**HOFSUP\***

[^Do you/Does name] get [^your/his/her] gas and electricity from the same supplier or from different suppliers?

- 1 Same supplier
- 2 Different suppliers

*IF whether has same supplier for gas and electricity = same*

[HoFSup = 1]

**HOFTOG\***

And [^do you/does name] pay for [^your/his/her] gas and electricity together or separately?

- 1 Pay together
- 2 Pay separately

*IF whether pays for gas and electricity together = together*

[HoFTog = 1]

**HOFPAY\*****SHOWCARD G14**

Which of these methods [^do you/does name] use to pay for [^your/his/her] gas and electricity?

- 1 Direct debit
- 2 Monthly / quarterly bill (including standing orders)
- 3 Pre-payment (key / card or token) meters
- 4 Included in rent
- 5 Frequent cash payment (ie more frequent than once a month)
- 6 Fuel direct / direct from benefits
- 7 Staywarm scheme
- 95 Other

*IF method of payment for gas and electricity = direct debit*

HoFPay = 1]

**HOFD\***

Is [^your/his/her] gas and electricity direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of direct debit for gas and electricity = monthly*

[HoFD = 1]

**HOFDM\***

How much is [^your/his/her] monthly direct debit for [^your/his/her] gas and electricity?

Range: 0..999

*IF amount of monthly direct debit for gas and electricity =*

NONRESPONSE

[HoFDM = NONRESPONSE]

**HOFDMB\***

Is it less than [^25 / 50 / 75 / 100 pounds], more than [^25 / 50 / 75 / 100pounds] or what?

**[Bracket results are recoded in HOFDML HOFDMU HOFDME HOFDMR]**

END OF FILTER

ELSE IF frequency of direct debit for gas and electricity = quarterly  
[HoFD = 2]

**HOFDQ\***

How much is [^your/his/her] quarterly direct debit for [^your/his/her] gas and electricity?

Range: 0..999

IF amount of quarterly direct debit for gas and electricity =

NONRESPONSE

[HoFDq = NONRESPONSE]

**HOFDQB\***

Is it less than [^75 / 150 / 200 / 300 pounds], more than [^75 / 150 / 200 / 300 pounds] or what?

**[Bracket results are recoded in HOFDQL HOFDQU HOFDQE HOFDQR]**

END OF FILTER

END OF FILTER

ELSE IF method of payment for gas and electricity = bill [HoFPay = 2]

**HOFB\***

Is [^your/his/her] gas and electricity bill monthly or quarterly?

1 Monthly

2 Quarterly

IF frequency of bill for gas and electricity = monthly

[HoFB = 1]

**HOFBMW\***

How much is [^your/his/her] monthly gas and electricity bill during winter?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN

HOME MORE

Range: 0..999

IF amount of monthly gas and electricity bill in winter = NONRESPONSE

[HoFBmw = NONRESPONSE]

**HOFBMW\***

Is it less than [^25 / 50 / 75 / 100 pounds], more than [^25 / 50 / 75 / 100 pounds] or what?

**[Bracket results are recoded in HOFBMWL HOFBMWU HOFBMWE HOFBMWR]**

END OF FILTER

**HOFBMS\***

And how much is [^your/his/her] monthly gas and electricity bill during summer?



Range: 0..999

*IF amount of monthly gas and electricity bill in summer = NONRESPONSE*  
*[HoFBms = NONRESPONSE]*

**HOFBMSB\***

Is it less than [<sup>^</sup>25 / 50 / 75 / 100 pounds], more than [<sup>^</sup>25 / 50 / 75 / 100 pounds] or what?

***[Bracket results are recoded in HOFBMSL HOFBMSU HOFBMSE HOFBMSR]***

END OF FILTER

*ELSE IF frequency of bill for gas and electricity = quarterly [HoFB = 2]*

**HOFBQW\***

How much is [<sup>^</sup>your/his/her] quarterly gas and electricity bill during *winter*?  
INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE  
Range: 0..999

*IF amount of quarterly gas and electricity bill in winter = NONRESPONSE*  
*[HoFBqw = NONRESPONSE]*

**HOFBQWB\***

Is it less than [<sup>^</sup>75 / 150 / 200 / 300 pounds], more than [<sup>^</sup>75 / 150 / 200 / 300 pounds] or what?

***[Bracket results are recoded in HOFBQWL HOFBQWU HOFBQWE HOFBQWR]***

END OF FILTER

**HOFBQS\***

And how much is [<sup>^</sup>your/his/her] quarterly gas and electricity bill during *summer*?  
Range: 0..999

*IF amount of quarterly gas and electricity bill in summer = NONRESPONSE*  
*[HoFBqs = NONRESPONSE]*

**HOFBQSB\***

Is it less than [<sup>^</sup>75 / 150 / 200 / 300 pounds], more than [<sup>^</sup>75 / 150 / 200 / 300pounds] or what?

***[Bracket results are recoded in HOFBQSL HOFBQSU HOFBQSE HOFBQSR]***

END OF FILTER

END OF FILTER

END OF FILTER

*ELSE IF method of payment for gas and electricity = prepay [HoFPay = 3]*

**HOFPW\***

In *winter*, how much [^do you/does name] pay into the gas and electricity meter in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..99

*IF amount pays into gas and electricity meter in average week in winter*

NONRESPONSE

[HoFPw = NONRESPONSE]

**HOFPWB\***

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50 pounds] or what?

**[Bracket results are recoded in HOFPWL HOFPWU HOFPWE HOFPWR]**

END OF FILTER

**HOFPS\***

And in *summer*, how much [^do you/does name] pay into the gas and electricity meter in an average week (to the nearest pound)?

Range: 0..99

*IF amount pays into gas and electricity meter in average week in summer =*

NONRESPONSE [HoFPs = NONRESPONSE]

**HOFPSB\***

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50 pounds] or what?

**[Bracket results are recoded in HOFPSL HOFPSU HOFPSE HOFPSR]**

END OF FILTER

*ELSE IF method of payment for gas and electricity = [included in rent, frequent cash payment, direct from benefits, other] [HoFPay = [4, 5, 6, 95]]*

**HOFOW\***

In *winter*, how much [^do you/does name] spend on gas and electricity in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..99

*IF amount spent on gas and electricity in average week in winter =*

NONRESPONSE

[HoFOw = NONRESPONSE]

**HOFOWB\***

Is it less than [^5 / 15 / 25 / 50 pounds], more than [^5 / 15 / 25 / 50 pounds] or what?

**[Bracket results are recoded in HOFOWL HOFOWU HOFOWE HOFOWR]**

END OF FILTER

**HOFOS\***

And in *summer* how much [**^do you/does name**] spend on gas and electricity in an average week (to the nearest pound)?

Range: 0..99

*IF amount spent on gas and electricity in average week in summer =*

NONRESPONSE

[HoFOs = NONRESPONSE]

**HOFOSB\***

Is it less than [**^5 / 15 / 25 / 50 pounds**], more than [**^5 / 15 / 25 / 50 pounds**] or what?

**[Bracket results are recoded in HOFOSL HOFOSU HOFOSE HOFOSR]**

END OF FILTER

ELSE *IF method of payment for gas and electricity = staywarm scheme*

[HoFPay = 7]

**HOFSP\***

Is [**^your/name's**] Staywarm payment weekly, monthly or quarterly?

1 Weekly

2 Monthly

3 Quarterly

*IF frequency of Staywarm payment = weekly*

[HoFSp = 1]

**HOFSW\***

How much is [**^your/name's**] weekly Staywarm payment for your gas and electricity?

Range: 0..999

*IF amount of Staywarm payment for gas and electricity per week =*

NONRESPONSE

[HoFSw = NONRESPONSE]

**HOFSWB\***

Is it less than [**^5 / 15 / 25 / 50 pounds**], more than [**^5 / 15 / 25 / 50 pounds**] or what?

**[Bracket results are recoded in HOFSWL HOFSWU HOFSWE HOFSWR]**

END OF FILTER

END OF FILTER

ELSE *IF frequency of Staywarm payment = monthly* [HoFSp = 2]

**HOFSM\***

How much is [**^your/name's**] monthly Staywarm payment for your gas and electricity?

Range: 0..999

*IF amount of Staywarm payment for gas and electricity per month =  
NONRESPONSE  
[HoFSm = NONRESPONSE]*

**HOF SMB\***

Is it less than [<sup>^</sup>25 / 50 / 75 / 100 pounds], more than [<sup>^</sup>25 / 50 / 75 / 100 pounds] or what?

**[Bracket results are recoded in HOF SML HOF SMU HOF SME HOF SMR]**

END OF FILTER

*ELSE IF frequency of Staywarm payment = quarterly [HoFSp = 3]*

**HOF SQ\***

How much is [<sup>^</sup>your/name's] quarterly Staywarm payment for your gas and electricity?

Range: 0..999

*IF amount of Staywarm payment for gas and electricity per quarter =  
NONRESPONSE  
[HoFSq = NONRESPONSE]*

**HOF SQB\***

Is it less than [<sup>^</sup>75 / 150 / 200 / 300 pounds], more than [<sup>^</sup>75 / 150 / 200 / 300 pounds] or what?

**[Bracket results are recoded in HOF SQL HOF SQU HOF SQE HOF SQR]**

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF (Household Fuel = mains gas) AND NOT (whether pays for gas and electricity together = together)*

*[(HoFuel = 1) AND NOT (HoFTog = 1)]*

**HOG PAY\***

**SHOWCARD G15**

Which of these methods [<sup>^</sup>do you/does name] use to pay for [<sup>^</sup>your/his/her] gas?

1 Direct debit

2 Monthly / quarterly bill (including standing orders)

3 Pre-payment (key / card or token) meters

4 Included in rent

5 Frequent cash payment (ie more frequent than once a month)

6 Fuel direct/direct from benefits

95 Other

*IF method of payment for gas = direct debit*

*[HoGPay = 1]*

**HOGD\***

Is [<sup>^</sup>your/his/her] gas direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of direct debit for gas = monthly*

*[HoGD = 1]*

**HOGDM\***

How much is [<sup>^</sup>your/his/her] monthly direct debit for [<sup>^</sup>your/his/her] gas?

Range: 0..999

*IF amount of monthly direct debit for gas = NONRESPONSE*

*[HoGDm = NONRESPONSE]*

**HOGDMB\***

Is it less than [<sup>^</sup>10 / 25 / 40 / 75 pounds], more than [<sup>^</sup>10 / 25 / 40 / 75 pounds] or what?

***[Bracket results are recoded in HOGDML HOGDMU HOGDME HOGDMR]***

END OF FILTER

*ELSE IF frequency of direct debit for gas = quarterly [HoGD = 2]*

**HOGDQ\***

How much is [<sup>^</sup>your/his/her] quarterly direct debit for [<sup>^</sup>your/his/her] gas?

Range: 0..999

*IF amount of quarterly direct debit for gas = NONRESPONSE*

*[HoGDq = NONRESPONSE]*

**HOGDQB\***

Is it less than [<sup>^</sup>30 / 75 / 100 / 150 pounds], more than [<sup>^</sup>30 / 75 / 100 / 150 pounds] or what?

***[Bracket results are recoded in HOGDQL HOGDQU HOGDQE HOGDMQR]***

END OF FILTER

END OF FILTER

END OF FILTER

*IF method of payment for gas = bill [HoGPay = 2]*

**HOGBP\***

Is [<sup>^</sup>your/his/her] gas bill monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF frequency of bill for gas = monthly [HoGBp = 1]*

**HOGBMW\***

How much is [<sup>^</sup>your/his/her] monthly gas bill during *winter*?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN

HOME MORE

Range: 0..999

*IF amount of monthly gas bill in winter = NONRESPONSE*

*[HoGBmw = NONRESPONSE]*

**HOGBMWB\***

Is it less than [<sup>^</sup>10 / 25 / 40 / 75 pounds], more than [<sup>^</sup>10 / 25 / 40 / 75 pounds] or what?

***[Bracket results are recoded in HOGBMWL HOGBMWU HOGBMWE HOGBMWR]***

END OF FILTER

**HOGBMS\***

And how much is [<sup>^</sup>your/his/her] monthly gas bill during *summer*?

Range: 0..999

*IF amount of monthly gas bill in summer = NONRESPONSE*

*[HoGBms = NONRESPONSE]*

**HOGBMSB\***

Is it less than [<sup>^</sup>10 / 25 / 40 / 75 pounds], more than [<sup>^</sup>10 / 25 / 40 / 75 pounds] or what?

***[Bracket results are recoded in HOGBMSL HOGBMSU HOGBMSE HOGBMSR]***

END OF FILTER

*ELSE IF frequency of bill for gas = quarterly [HoGBp = 2]*

**HOGBQW\***

How much is [<sup>^</sup>your/his/her] quarterly gas bill during *winter*?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..999

*IF amount of quarterly gas bill in winter = NONRESPONSE*

*[HoGBqw = NONRESPONSE]*

**HOGBQWB\***

Is it less than [<sup>^</sup>30 / 75 / 100 / 150 pounds], more than [<sup>^</sup>30 / 75 / 100 / 150 pounds] or what?

***[Bracket results are recoded in HOGBQWL HOGBQWU HOGBQWE HOGBQWR]***

END OF FILTER

**HOGBQS\***

And how much is [<sup>^</sup>your/his/her] quarterly gas bill during *summer*?

Range: 0..999

*IF amount of quarterly gas bill in summer = NONRESPONSE*

[HoGBqs = NONRESPONSE]

**HOGBQSB\***

Is it less than [^30 / 75 / 100 / 150 pounds], more than [^30 / 75 / 100 / 150 pounds] or what?

**[Bracket results are recoded in HOGBQSL HOGBQSU HOGBQSE HOGBQSR]**

END OF FILTER

END OF FILTER

ELSE IF method of payment for gas = prepay [HoGPay = 3]

**HOGPW\***

In *winter*, how much [^do you/does name] pay into the gas meter in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE  
Range: 0..99

IF amount pays into gas meter in average week in winter = NONRESPONSE

[HoGPw = NONRESPONSE]

**HOGPWB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOGPWL HOGPWU HOGPWE HOGPWR]**

END OF FILTER

**HOGPS\***

And in *summer*, how much [^do you/does name] pay into the gas meter in an average week (to the nearest pound)?

Range: 0..99

IF amount pays into gas meter in average week in summer = NONRESPONSE

[HoGPs = NONRESPONSE]

**HOGPSB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOGPSL HOGPSU HOGPSE HOGPSR]**

END OF FILTER

ELSE IF method of payment for gas = included in rent, frequent cash payment, direct from benefits, other

[HoGPay = [4, 5, 6, 95]]

**HOGOW\***

In *winter*, how much [^do you/does name] spend on gas in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE  
Range: 0..99

*IF amount spent on gas in average week in winter = NONRESPONSE*  
[HoGOW = NONRESPONSE]

**HOGOWB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOGOWL HOGOWU HOGOWE HOGOWR]**

END OF FILTER

**HOGOS\***

And in *summer* how much [^do you/does name] spend on gas in an average week (to the nearest pound)?

Range: 0..99

*IF amount spent on gas in in average week in summer = NONRESPONSE*  
[HoGOs = NONRESPONSE]

**HOGOSB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOGOSL HOGOSU HOGOSE HOGOSR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF (household fuel = electricity) AND NOT (whether pays for gas and electricity together = together)*  
[(HoFuel = 1) AND NOT (HoFTog = 1)]

**HOEPAY\***

**SHOWCARD G15**

Which of these methods [^do you/does name] use to pay for [^your/his/her] electricity?

- 1 Direct debit
- 2 Monthly / quarterly bill (including standing orders)
- 3 Pre-payment (key / card or token) meters
- 4 Included in rent
- 5 Frequent cash payment (i.e. more frequent than once a month)
- 6 Fuel direct/direct from benefits
- 95 Other

*IF method of payment for electricity = direct debit*  
HoEPay = 1]

**HOED\***

Is [^your/his/her] electricity direct debit monthly or quarterly?

- 1 Monthly



2 Quarterly

*IF frequency of direct debit for electricity = monthly*

*[HoED = 1]*

**HOEDM\***

How much is [*^your/his/her*] monthly direct debit for [*^your/his/her*] electricity?

Range: 0..999

*IF amount of monthly direct debit for electricity = NONRESPONSE*

*[HoEDm = NONRESPONSE]*

**HOEDMB\***

Is it less than [*^10 / 25 / 40 / 75 pounds*], more than [*^10 / 25 / 40 / 75 pounds*] or what?

***[Bracket results are recoded in HOEDML HOEDMU HOEDME HOEDMR ]***

END OF FILTER

*ELSE IF frequency of direct debit for electricity = quarterly [HoED = 2]*

**HOEDQ\***

How much is [*^your/his/her*] quarterly direct debit for [*^your/his/her*] electricity?

Range: 0..999

*IF amount of quarterly direct debit for electricity = NONRESPONSE*

*[HoEDq = NONRESPONSE]*

**HOEDQB\***

Is it less than [*^30 / 75 / 100 / 150 pounds*], more than [*^30 / 75 / 100 / 150 pounds*] or what?

***[Bracket results are recoded in HOEDQL HOEDQU HOEDQE HOEDQR]***

END OF FILTER

END OF FILTER

*ELSE IF method of payment for electricity = bill [HoEPay = 2]*

**HOEB\***

Is [*^your/his/her*] electricity bill monthly or quarterly?

1 Monthly

2 Quarterly

*IF frequency of bill for electricity = monthly*

*[HoEB = 1]*

**HOEBMW\***

How much is [*^your/his/her*] monthly electricity bill during *winter*?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER

EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN

HOME MORE

Range: 0..999

*IF amount of monthly electricity bill in winter = NONRESPONSE*

[HoEBmw = NONRESPONSE]

**HOEBMW\***

Is it less than [<sup>^</sup>10 / 25 / 40 / 75 pounds], more than [<sup>^</sup>10 / 25 / 40 / 75 pounds] or what?

**[Bracket results are recoded in HOEBMWL HOEBMWU HOEBMWE HOEBMWR]**

END OF FILTER

**HOEBMS\***

And how much is [<sup>^</sup>your/his/her] monthly electricity bill during *summer*?  
Range: 0..999

*IF amount of monthly electricity bill in summer = NONRESPONSE*  
[HoEBms = NONRESPONSE]

**HOEBMSB\***

Is it less than [<sup>^</sup>10 / 25 / 40 / 75 pounds], more than [<sup>^</sup>10 / 25 / 40 / 75 pounds] or what?

**[Bracket results are recoded in HOEBMSL HOEBMSU HOEBMSE HOEBMSR]**

END OF FILTER

ELSE *IF frequency of bill for electricity = quarterly* [HoEB = 2]

**HOEBQW\***

How much is [<sup>^</sup>your/his/her] quarterly electricity bill during *winter*?  
INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER  
EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN  
HOME MORE  
Range: 0..999

*IF amount of quarterly electricity bill in winter = NONRESPONSE*  
[HoEBqw = NONRESPONSE]

**HOEBQWB\***

Is it less than [<sup>^</sup>30 / 75 / 100 / 150 pounds], more than [<sup>^</sup>30 / 75 / 100 / 150 pounds] or what?

**[Bracket results are recoded in HOEBQWL HOEBQWU HOEBQWE HOEBQWR]**

END OF FILTER

**HOEBQS\***

And how much is [<sup>^</sup>your/his/her] quarterly electricity bill during *summer*?  
Range: 0..999

*IF amount of quarterly electricity bill in summer = NONRESPONSE*  
[HoEBqs = NONRESPONSE]

**HOEBQSB\***

Is it less than [<sup>^</sup>30 / 75 / 100 / 150 pounds], more than [<sup>^</sup>30 / 75 / 100 /

150 pounds] or what?

**[Bracket results are recoded in HOEBQSL HOEBQSU HOEBQSE  
HOEBQSR]**

END OF FILTER

END OF FILTER

ELSE IF method of payment for electricity = prepay [HoEPay = 3]

**HOEPW\***

In *winter*, how much [^do you/does name] pay into the electricity meter in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE  
Range: 0..99

IF amount pays into electricity meter in average week in winter = NONRESPONSE  
[HoEPw = NONRESPONSE]

**HOEPWB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds]  
or what?

**[Bracket results are recoded in HOEPWL HOEPWU HOEPWE HOEPWR]**

END OF FILTER

**HOEPS\***

And in *summer*, how much [^do you/does name] spend pay into the electricity meter in an average week (to the nearest pound)?

Range: 0..99

IF amount pays into electricity meter in average week in summer =  
NONRESPONSE  
[HoEPs = NONRESPONSE]

**HOEPSB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50  
pounds] or what?

**[Bracket results are recoded in HOEPSL HOEPSU HOEPSE HOEPSR]**

END OF FILTER

ELSE IF method of payment for electricity = included in rent, frequent cash payments, direct from benefits, other [HoEPay = 4, 5, 6, 95]

**HOEOW\***

In *winter*, how much [^do you/does name] spend on electricity in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE  
Range: 0..99

IF amount spent on electricity in average week in winter = NONRESPONSE

[HoEOW = NONRESPONSE]

**HOEOWB\***

Is it less than [<sup>5</sup> / 15 / 30 / 50 pounds], more than [<sup>5</sup> / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOEOWL HOEOWU HOEOWE HOEOWR]**

END OF FILTER

**HOEOS\***

And in *summer*, how much [<sup>do you/does name</sup>] household spend on electricity in an average week (to the nearest pound)?

Range: 0..99

*IF amount spent on electricity in average week in summer = NONRESPONSE*

[HoEOs = NONRESPONSE]

**HOEOSB\***

Is it less than [<sup>5</sup> / 15 / 30 / 50 pounds], more than [<sup>5</sup> / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOEOSL HOEOSU HOEOSE HOEOSR]**

END OF FILTER

END OF FILTER

END OF FILTER

*IF Household fuel = coal*

[HoFuel = 3]

**HOF CW\***

Now thinking about how much coal / smokeless fuel [<sup>you use/name uses</sup>] in [<sup>your/his/her</sup>] home. In *winter*, how much [<sup>do you/does he/she</sup>] spend on coal / smokeless fuel in an average week (to the nearest pound)?

INTERVIEWER: If free coal enter zero.

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..99

*IF amount spends on coal / smokeless fuel in average week in winter =*

*NONRESPONSE*

[HoFCw = NONRESPONSE]

**HOF CWB\***

Is it less than [<sup>5</sup> / 15 / 30 / 50 pounds], more than [<sup>5</sup> / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOF CWL HOF CWU HOF CWE HOF CWR]**

END OF FILTER

**HOFCS\***

And in *summer*, how much [<sup>do you/does he/she</sup>] spend on coal / smokeless fuel in an average week (to the nearest pound)?

INTERVIEWER: If free coal enter zero.  
Range: 0..99

*IF amount spends on coal / smokeless fuel in average week in summer =*

NONRESPONSE

[HoFCs = NONRESPONSE]

**HOFCSB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFCSL HOFCSU HOFCSE HOFCSR]**

END OF FILTER

END OF FILTER

*IF household fuel = paraffin / bottled gas*

[HoFuel= 4]

**HOFPGW\***

Now thinking about how much paraffin / bottled gas [^you use/name uses] in [^your/his/her] home. In *winter*, how much [^do you/does he/she] spend on paraffin / bottled gas in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..99

*IF amount spends on paraffin/bottled gas in average week in winter =*

NONRESPONSE

[HoFPGw = NONRESPONSE]

**HOFPGWB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFPGWL HOFPGWU HOFPGWE HOFPGWR]**

END OF FILTER

**HOFPGS\***

And in *summer*, how much [^do you/does he/she] spend on paraffin / bottled gas in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on paraffin / bottled gas in average week in summer =*

NONRESPONSE

[HoFPGs = NONRESPONSE]

**HOFPGSB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFPGSL HOFPGSU HOFPGSE HOFPGSR]**

END OF FILTER

END OF FILTER

*IF household fuel = oil*

*[HoFuel = 5]*

**HOFIOW\***

Now thinking about how much gas [*^you use/name uses*] in [*^your/his/her*] home. In *winter*, how much [*^do you/does he/she*] spend on oil in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..99

*IF amount spends on oil in average week in winter = NONRESPONSE*

*[HoFOIw = NONRESPONSE]*

**HOFIOWB\***

Is it less than [*^5 / 15 / 30 / 50 pounds*], more than [*^5 / 15 / 30 / 50 pounds*] or what?

***[Bracket results are recoded in HOFIOWL HOFIOWU HOFIOWE HOFIOWR]***

END OF FILTER

**HOFIOWS\***

And in *summer*, how much [*^do you/does he/she*] spend on oil in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on oil in average week in summer = NONRESPONSE*

*[HoFOIs = NONRESPONSE]*

**HOFIOWSB\***

Is it less than [*^5 / 15 / 30 / 50 pounds*], more than [*^5 / 15 / 30 / 50 pounds*] or what?

***[Bracket results are recoded in HOFIOWSL HOFIOWSU HOFIOWSE HOFIOWSR]***

END OF FILTER

END OF FILTER

*IF household fuel = wood*

*[HoFuel = 6]*

**HOFWW\***

Now thinking about how much wood [*^you use/name uses*] in [*^your/his/her*] home. In *winter*, how much [*^do you/does he/she*] spend on wood in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..99

*IF amount spends on wood in average week in winter = NONRESPONSE*

*[HoFWw = NONRESPONSE]*

**HOFWWB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFWWL HOFWWU HOFWWE HOFWWR]**

END OF FILTER

**HOFWS\***

And in *summer*, how much [^do you/does he/she] spend on wood in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on wood in average week in summer = NONRESPONSE*

*[HoFws = NONRESPONSE]*

**HOFWSB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFWSL HOFWSU HOFWSE HOFWSR]**

END OF FILTER

END OF FILTER

*IF household fuel = other*

*[HoFuel = 95]*

**HOFUELO\***

Which other sources of fuel or power [^do you/does he/she] use?

String 50

**[Reponses to HOFUELO are merged with responses to HOFUEL and recoded into variables: HOFUEZ1 HOFUEZ2 HOFUEMAG HOFUEMEL HOFUEMCO HOFUEMPA HOFUEMOI HOFUEMWO HOFUEM85 HOFUEM86]**

**HOFXW\***

Now thinking about how much [^other source of fuel or power used] [^you use/he/she uses] in your home. In *winter*, how much [^do you/does he/she] spend on [^other source of fuel or power used] in an average week (to the nearest pound)?

INTERVIEWER: IF ASKED, "WINTER" REFERS TO THIS LAST WINTER EVEN IF THAT HAS NOT BEEN TYPICAL BECAUSE THEY HAVE BEEN HOME MORE

Range: 0..99

*IF amount spends on other fuel in average week in winter = NONRESPONSE*

*[HoFXw = NONRESPONSE]*

**HOFXWB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in hofxwl, hofxwu, hofxwe, hofxwr]**

END OF FILTER

**HOFXS\***

And in *summer*, how much [^do you/does he/she] spend on [^other source of fuel or power used] in an average week (to the nearest pound)?

Range: 0..99

*IF amount spends on other source of fuel in average week in summer =*

NONRESPONSE

[HoFXs = NONRESPONSE]

**HOFXSB\***

Is it less than [^5 / 15 / 30 / 50 pounds], more than [^5 / 15 / 30 / 50 pounds] or what?

**[Bracket results are recoded in HOFXSL HOFXSU HOFXSE HOFXSR]**

END OF FILTER

END OF FILTER

*IF had a vehicle at the last interview*

[ff\_HoVeh >= and <= 20]

LOOP FOR k:= 1 TO HoVeh (one loop for each vehicle at the previous interview)

**HOCC\***

At the time of last interview, [^you / ^name]] or someone in [^your/^name's]] household owned (or was the main user of) a [^make and model of vehicle owned in Last int] [^BLANK / with a [^letter] registration / with a [^letter] registration letter at the beginning / with a [^letter] registration at the end / with a 51/02 new registration number / with a new registration number]. Is that vehicle still owned by you or someone in your household?

[^BLANK / INTERVIEWER: Owner(s) in previous wave: [^name] / [^name] and [^name]

1 Yes, still has vehicle

2 Never had vehicle

3 Had similar vehicle but details incorrect

4 Vehicle has now changed ownership within the household

5 Out of service, sold, given away or keeper no longer in household

6 Not read out as didn't make sense

**[Responses for up to 20 cars are recoded in HOCC01 to HOCC20]**

END OF FILTER

*IF (number of remaining vehicles since last wave < 1) OR (number of vehicles owned in household (Last int) < 1) OR (number of vehicles owned in household (Last int) = NONRESPONSE)*

*[(NoFOldVeh < 1) OR (.ff\_HoVeh < 1) OR (ff\_HoVeh = NA,DK, Ref, new partner)]*

**HOVEH\***

How many cars, vans or motorbikes, if any, [^do you / does [^name]] or [^your / his / her] household] own (including company, lease or cars owned through motability scheme)?

INTERVIEWER: Include cars owned by people outside the household *only* if the respondent's household is the sole or main user of that car.

Exclude company cars if only available for business use.

Range: 0..20

END OF FILTER



IF whether change in number of vehicles since last wave = yes

[VehChange = 1]

**HOVEHX\***

Can I just check, in total, how many cars, vans or motorbikes, if any, [^do you / does [^name]] own (including company or lease vehicles)?

Range: 0..20

IF (total number of vehicles = RESPONSE) AND (total number of vehicles > 0)

[(HoVehx =RESPONSE) AND (VehTot > 0)]

**[CHECK HO48] CHECK:** IF (number of vehicles owned in household < calculated number of vehicles in household) [HoVehx < VehTot]

That is less than the [^VehTot] vehicles covered in the previous table.

Please check the answer here or go back to the table.

**[CHECK HO49] CHECK:** IF (number of vehicles owned in household > calculated number of vehicles in household) [HoVehx > VehTot]

That is more than the [^VehTot] vehicles covered in the previous table.

Please check the answer here or go back to the table.

END OF FILTER

END OF FILTER

IF (number of vehicles owned in household >0) OR (number of vehicles owned in household (last int) >0)

[(HoVeh > 0) OR (NoFOldVeh > 0)]

LOOP FOR up to car numbers 1 TO 20

IF ((number of vehicles owned in household + number of vehicles owned in household at Last int) >= Idx) OR (C[Idx - 1].whether owns any other vehicles = yes)

[((HoVeh + NoFOldVeh) >= Idx) OR (C[Idx - 1].HoVNew = Yes)]

IF status of vehicle reported last time = [still has vehicle, changed ownership]

[HoVSt = [1, 4]]

ELSE IF status of vehicle reported last time = [had similar vehicle but details incorrect, has new vehicle] [HoVSt = 3, 6]

END OF FILTER

**HOVST**

Computed: status of vehicle

- 1 Yes, still has vehicle
- 2 Never had vehicle
- 3 Had similar vehicle but details incorrect
- 4 Vehicle has now changed ownership within the household
- 5 Out of service, sold, given away or keeper no longer in household
- 6 New vehicle (since previous wave)

*IF status of vehicle = has similar, or new*

*[HoVSt = 3 or 6]*

**HOVM**

What make and model is the car, van or motorbike?

String 60

**HOVW**

ASK OR CODE: Is this a car, a van or a motorbike?

1 Car

2 Van

3 Motorbike

**[Responses for up to 16 cars are recoded in HOVW, HOVW2 to HOVW16]**

**HOVAG**

How old is this [<sup>^</sup>car / van / motorbike]?

INTERVIEWER: Code here how to record the age of the vehicle.

Record registration year even if bought second hand. If it has a personalised or cherished number plate, record the year the vehicle was registered.

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 age of vehicle = answer given in year registered*

*[HoVAg = 1]*

**HOVYR (archived under SL)**

INTERVIEWER: Enter the year the vehicle was registered.

Range: 1900..2050

**[CHECK HO50] SIGNAL:** year of registration > year of interview

IF [HoVYr >|IntDat.YEAR]

INTERVIEWER: Please check, you seem to have entered a future year!

*ELSE if age of vehicle = answer given in registration letter (letter at beginning)*

*[HoVAg = 2]*

**HOVLR (archived under SL)**

INTERVIEWER: Enter the registration letter (the letter at the beginning).

String 2

*ELSE if age of vehicle = answer given in registration letter (letter at end)*

*[HoVAg = 3]*

**HOVER (archived under SL)**

INTERVIEWER: Enter the registration letter (the letter at the end).

String 2

*ELSE IF age of vehicle = answer given in new registration number*

*[HoVAg = 4]*

**HOVNR (archived under SL)**

INTERVIEWER: Code the new registration number (the two digit number in the middle).

Use code 95 for 'other' and specify at the next question

*IF new registration number = other [HoVNr = 95]*

**HOVNO (archived under SL)**

INTERVIEWER: Enter the other new registration number.

Range: 0..99

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

END OF LOOP

*IF (household size > 1) AND (status of vehicle <> still has vehicle)  
[HHTot > 1 AND HoVSt <> 1]*

**HOVOW**

[^Who / Can I just check, who] owns this [^car / van / motorbike]?

PROBE: Who else?

CODE ALL THAT APPLY

01 [^Person's name[1]]

02 [^Person's name[2]]

03 [^Person's name[3]]

04 [^Person's name[4]]

05 [^Person's name[5]]

06 [^Person's name[6]]

07 [^Person's name[7]]

08 [^Person's name[8]]

09 [^Person's name[9]]

10 [^Person's name[10]]

11 [^Person's name[11]]

12 [^Person's name[12]]

13 [^Person's name[13]]

14 [^Person's name[14]]

15 [^Person's name[15]]

16 [^Person's name[16]]

17 [Not a household member]

18 [Company/employer]

19 [Lease company, including motability scheme]

**[code maximum 4 out of 19 possible responses]**

Description	Variable	Archive
Person 1	HoVOw1	Hovw01
Person 2	HoVOw2	Hovw02
Person 3	HoVOw3	Hovw03
Person 4	HoVOw4	Hovw04
Person 5	HoVOw5	Hovw05
Person 6	HoVOw6	Hovw06
Person 7	HoVOw7	Hovw07
Person 8	HoVOw8	Hovw08
Person 9	HoVOw9	Hovw09
Person 10	HoVOw10	Hovw010

Person 11	HoVOw11	Hovw011
Person 12	HoVOw12	Hovw012
Person 13	HoVOw13	Hovw013
Person 14	HoVOw14	Hovw014
Person 15	HoVOw15	Hovw015
Person 16	HoVOw16	Hovw016
Not a household member	HoVOw17	Hovw017
Company/employer	HoVOw18	Hovw018
Lease company, including motability scheme	HoVOw19	Hovw019

END OF FILTER

*IF (Sequence number of vehicles >= Number of vehicle in feed forward data)  
AND (number of vehicles owned in household <> RESPONSE)  
[PSeq >= PLast AND HoVeh <> RESPONSE - PSeq and PLast are non-archived  
computed variables]*

**HOVNEW\***

Are there any (other) vehicles owned by [<sup>^</sup>you / [<sup>^</sup>name] (or a member of this household)] (including company, lease or cars owned through motability scheme)?  
INTERVIEWER: Include cars owned by people outside the household *only* if respondent's household is the sole or main user of that car. Exclude company cars if only available for business use.

- 1 Yes
- 2 No

**[Responses for up to 16 cars are recoded in HOVNW, HOVNW2 to HOVNW16]**

END OF FILTER

*[CHECK HO51] CHECK: LOOP FOR Idy:= 1 TO 16  
IF Idx = C[Idx].HoVOw [Idy = C.HoVOw]  
CHECK: IF DMName >EMPTY [DMName >EMPTY]  
<sup>^</sup>Idy is not a valid person number. Please change!*

END OF FILTER

**HOX**

INTERVIEWER: The Housing section is finished.  
Please enter <1> here to make the program store the current time and date.  
Range: 1..1

**WhoSo**

INTERVIEWER: Was there anyone other than you and the respondent(s) in the room during the interview so far?

- 1 No
- 2 Yes - respondent's spouse or partner
- 3 Yes - other household member (adult)
- 4 Yes - other household member (child)
- 5 Not a household member

**[code maximum 4 out of 5 possible responses]**

Description	Variable	Archive
No-one	WhoSo1	Whoso1
Spouse or partner of respondent	WhoSo2	Whoso2

Other household member (adult)	WhoSo3	Whoso3
Other household member (child)	WhoSo4	Whoso4
Not a household member	WhoSo5	Whoso5

# COGNITIVE FUNCTION MODULE (CF)

## 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.

01 Press <1> and <Enter> to continue.

## CFMETM

Part of this study is concerned with people's memory, and ability to think about things. First, 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?

## CFMETMT

Compared to two years ago, would you say your memory is...READ OUT...

1. better now,
2. about the same,
3. or worse now than it was then?

## CFMAP

How would you rate your other mental abilities such as thinking clearly and solving problems at the present time?

Would you say they are ...READ OUT...

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

## CFMATY

Compared to two years ago, would you say your other mental abilities are ...READ OUT...

1. better now,
2. about the same,
3. or worse now than they were then?

## 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.

INTERVIEWER: BEFORE STARTING THE TESTS, MAKE SURE RESPONDENT HAS GLASSES ETC IF NEEDED.

Press <1> and <Enter> to continue.

Range:1..1

## CFDATD

Please tell me today's date.

INTERVIEWER: CODE WHETHER THE DAY OF MONTH ([^TODAY'S DATE]) IS GIVEN CORRECTLY.

1 Day of month given correctly

2 Day of month given incorrectly or doesn't know day

**CFDATM**

INTERVIEWER: CODE WHETHER THE MONTH ([^TODAY'S DATE]) IS GIVEN CORRECTLY.

- 1 Month given correctly
- 2 Month given incorrectly/doesn't know month

**CFDATY**

INTERVIEWER: CODE WHETHER THE YEAR ([^TODAY'S DATE]) IS 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: [^today's day]

- 1 day of week given correctly
- 2 day of week given incorrectly/doesn't know day

**[CFPROM, CFPROMO – removed]**

**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.

[^IF VAPI=1: INTERVIEWER: if the respondent cannot do the test or refuses to do it please code below. Otherwise, please share your screen and then press <1> and <Enter> to activate the test message.]

**CFTEST**

INTERVIEWER: If the respondent cannot hear properly, adjust the volume on the laptop, then go back to the previous question and press <Enter> to play the test message again.

INTERVIEWER: IF THE 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
- 3 Respondent cannot do the test
- 4 Respondent refuses to do the test

**{IF VAPI=1 AND CFTEST =2,3,4}**

**NOSHOW**

INTERVIEWER: PLEASE STOP SHARING THE SCREEN AND PRESS 1 TO CONTINUE

- 1 Continue

END OF FILTER

**IF RESPONDENT CANNOT DO WORD RECALL TEST OR REFUSES TO DO TEST:  
CFTEST = 3, 4**

**CFNOWORD**

INTERVIEWER: PLEASE GIVE REASON(S) WHY RESPONDENT CANNOT DO TEST

INTERVIEWER: CODE ALL THAT APPLY

1. Illness or physical impairment that affects ability to perform the test
2. Doesn't understand instructions
3. Environment too noisy
4. Problems with the laptop
5. Respondent refused/didn't want to take part
95. Other answer

END OF FILTER

### CFWRDS

*[Fed forward variable: word list used for this respondent.]*

*[Note for users - Respondents were read out one of four lists of words. They were given a different list to the one they were given at the last interview and each respondent in a household was given a different list. Please look at the cognitive function booklet for the four lists of words which were used.]*

*IF how list read out = read by interviewer*

*[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?

INTERVIEWER: IF NO, EXPLAIN FURTHER.

HAVE COGNITIVE ASSESSMENT BOOKLET READY.

READ OUT WORD LIST BELOW AT A SLOW STEADY RATE APPROXIMATELY ONE WORD EVERY 2 SECONDS.

*[^list of words]*

After word list has been read out press <1> and <Enter>.

END OF FILTER

*IF how list read out = read 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?

INTERVIEWER: IF NO, EXPLAIN FURTHER.

If yes, press <Enter> to begin test and have booklet ready.

*IF word list used for respondent = Word list A*

*[CfWrds = 1]*

### CFSNDA

INTERVIEWER: After the word list has been read out press 1 and <Enter>.

*[^IF VAPI<>1 [Word list A – see cognitive function booklet]*

*IF VAPI=1: "INTERVIEWER PLEASE REFER TO WORD LIST A IN YOUR BOOKLET."]*



END OF FILTER

*IF word list used for respondent = Word list B*

*[CfWrds = 2]*

**CFSNDB**

INTERVIEWER: After the word list has been read out press <1> and <Enter>.

*[^IF VAPI<>1 [Word list B – see cognitive function booklet]*

*IF VAPI=1: "INTERVIEWER PLEASE REFER TO WORD LIST B IN YOUR BOOKLET."]*

END OF FILTER

*IF word list used for respondent = Word list C*

*[CfWrds = 3]*

**CFSNDC**

INTERVIEWER: After the word list has been read out press 1 and <Enter>.

*[^IF VAPI<>1 [Word list C – see cognitive function booklet]*

*IF VAPI=1: "INTERVIEWER PLEASE REFER TO WORD LIST C IN YOUR BOOKLET."]*

END OF FILTER

*IF word list used for respondent = Word list D*

*[CfWrds = 4]*

**CFSNDD**

INTERVIEWER: After the word list has been read out press 1 and <Enter>.

*[^IF VAPI<>1 [Word list D – see cognitive function booklet]*

*IF VAPI=1: "INTERVIEWER PLEASE REFER TO WORD LIST D IN YOUR BOOKLET."]*

END OF FILTER

END OF FILTER

***IF CFTEST =1 or CFTest=2***

**CFLISEN**

Now please tell me the words you can recall.

*[^IF VAPI=1 AND CFTEST=1: "INTERVIEWER PLEASE REFER TO WORD LIST [A, B, C, D] IN YOUR BOOKLET.";*

*IF VAPI<>1: ^list of words]*

INTERVIEWER: WRITE THE WORDS IN THE BOOKLET PROVIDED. ALLOW AS MUCH TIME AS THE RESPONDENT WISHES, UP TO 2 MINUTES. ENTER THE NUMBER OF WORDS THE RESPONDENT CORRECTLY RECALLS.

Range: 0..10

***[CHECK CF1] CHECK:*** If entered a DK or RF answer [IF not (number of words correctly recalled = RESPONSE) OR (number of words correctly recalled = EMPTY) [IF not (CfLisEn = RESPONSE OR CfLisEn = EMPTY)]

INTERVIEWER: Please enter the number of words the respondent correctly recalls.

*IF Video interview and word list read out by computer*

*[IF VAPI=1 AND CFTEST =1]*

**SHOWEND**

INTERVIEWER: PLEASE STOP SHARING THE SCREEN AND PRESS 1 TO CONTINUE .

1. Continue

END OF FILTER

**IF CFTEST =1 or CFTest=2****CFLISP**

INTERVIEWER: PLEASE INDICATE WHETHER ANY OF THE FOLLOWING PROBLEMS OCCURRED IN RELATION TO WORD RECALL.

CODE ALL THAT APPLY

- 1 Respondent had difficulty hearing any of the words
- 2 Interruption occurred while you were reading list
- 3 Other problem (please specify)
- 4 No problems occurred
- 5 Language problem

Description	Variable	Archive
Respondent had difficulty hearing any of the words	CfLisP1	CfLisP1
Interruption occurred while you were reading list	CfLisP2	CfLisP2
Other problem (please specify)	CfLisP3	CfLisP3
No problems occurred	CfLisP4	CfLisP4
Language problem	CfLisP5	CfLisP5

**IF CFTEST =1 or CFTest=2****CFLISA**

INTERVIEWER: PLEASE INDICATE WHETHER THE RESPONDENT WROTE DOWN ANY OF THE WORDS OR USED SOME KIND OF AID TO RECALL THE WORDS IN THE LIST DURING THE WORD RECALL TEST.

- 1 Respondent definitely used aid
- 2 Suspect that respondent used aid, but not certain
- 3 No reason to think respondent used aid

**CFANIST**

Now I would like you to name as many different animals as you can think of.

You have one minute to do this.

[^IF VAPI=2 AND CFTEST <>2: "The computer voice will tell you when to stop.";

IF VAPI=1 OR CFTEST =2: "I will tell you when to stop."] Ready, go!

INTERVIEWER: *ONLY IF* THE PARTICIPANT ASKS FOR CLARIFICATION, EXPLAIN THAT ANIMALS INCLUDE BIRDS, INSECTS, FISH ETC.

INTERVIEWER: Press <1> and <Enter> as you say *go!*

Range : 1..1

**CFANI**

INTERVIEWER: Write animals mentioned in booklet provided.

Enter the number of different animals mentioned.

See help <F9> for rules about what animals to include.

Rules for scoring animal naming task:

Do *not* count repetitions and do not count redundancies (e.g. white cow, brown cow).

Do *not* count named animals (e.g. Spot, Bambi, or Yogi Bear).

Different breeds (e.g. dog, terrier, poodle) and different gender or generation-specific names (e.g. bull, cow, steer, heifer, calf) *each* count as *correct*

If the respondent gives the name of an animal which you have not heard of (e.g. kudu, echidna), give them the benefit of the doubt count them as *correct*.

Range : 0..100, NODK

**[CHECK CF2] CHECK:** IF (EditQre <> Yes) THEN CHECK (CfAni = RESPONSE) OR (CfAni = EMPTY)  
INTERVIEWER: Please enter the number of different animals mentioned.

**CfC20A**

For this next question, please try to count backward as quickly as you can from the number I will give you. I will tell you when to stop.

INTERVIEWER: ALLOW RESPONDENT TO START AGAIN IF HE/SHE WISHES TO DO SO.

INTERVIEWER: PRESS <1> AND <Enter> AS YOU SAY 'Please start with: 20'

Press 1 and <Enter> to continue

**CfC20B**

INTERVIEWER: WAIT UNTIL RESPONDENT HAS COUNTED 10 NUMBERS THEN PRESS <1> AND <Enter> TO CONTINUE AS SOON AS RESPONDENT HAS COUNTED 10 NUMBERS, OR STOPS, OR ASKS TO START AGAIN.

INTERVIEWER: CORRECT RESPONSES INCLUDE COUNTING DOWN FROM 19 TO 10 OR FROM 20 TO 11.

Press 1 and <Enter> to continue

**CfC20C**

You may stop now. Thank you.

INTERVIEWER: CODE AS CORRECT IF RESPONDENT COUNTED BACKWARDS FROM 19 TO 10 OR FROM 20 TO 11 WITHOUT ERROR.

INTERVIEWER: USE [Ctrl-R] IF RESPONDENT REFUSED TO TRY THE TASK.

1. Correct
2. Incorrect
3. Wants to start again

*IF CfC20C = Wants to start again [IF CfC20C=3]*

**CfC20D**

Let's try again.

INTERVIEWER: PRESS [Enter] AS SOON AS YOU READ OUT:

The number to count backward from is: 20

Press 1 and <Enter> to continue

**CfC20E**

INTERVIEWER: WAIT UNTIL RESPONDENT HAS COUNTED 10 NUMBERS THEN PRESS <1>

AND <Enter> AS SOON AS RESPONDENT HAS COUNTED 10 NUMBERS OR STOPS.

INTERVIEWER: CORRECT RESPONSES INCLUDE COUNTING DOWN FROM 19 TO 10 OR FROM 20 TO 11.

Press 1 and <Enter> to continue

**CfC20F**

You may stop now. Thank you.

INTERVIEWER: CODE AS CORRECT IF RESPONDENT COUNTED BACKWARDS FROM 19 TO 10 OR FROM 20 TO 11 WITHOUT ERROR.

USE [Ctrl-R] IF RESPONDENT REFUSED TO TRY THE TASK.

1. Correct
2. Incorrect

END OF FILTER

CfSvA

Now let's try some subtraction of numbers. One hundred minus 7 equals what?

INTERVIEWER: If respondent adds 7 instead, you may repeat question.

Range: 0..999

*IF gave an answer to CfSvA [CfSvA = RESPONSE]*

**CfSvB**

INTERVIEWER: THIS IS THE SECOND SUBTRACTION.

And 7 from that?

Range: 0..997

*IF gave an answer to CfSvB [CfSvB = RESPONSE]*

**CfSvC**

INTERVIEWER: THIS IS THE THIRD SUBTRACTION.

And 7 from that?

Range: 0..997

*IF gave an answer to CfSvC [CfSvC = RESPONSE]*

**CfSvD**

INTERVIEWER: THIS IS THE FOURTH SUBTRACTION.

And 7 from that?

Range: 0..997

*IF gave and answer to CfSvD [CfSvD = RESPONSE]*

**CfSvE**

INTERVIEWER: THIS IS THE FIFTH SUBTRACTION.

And 7 from that?

Range: 0..997

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

**CfSvCh**

"INTERVIEWER: PLEASE INDICATE WHETHER THE RESPONDENT USED PAPER AND PEN/PENCIL OR ANY OTHER AIDS WHEN COMPLETING THE NUMBER SUBTRACTION.

CHOOSE THE MOST APPROPRIATE ANSWER

1. Respondent definitely used aid
2. Suspect that respondent used aid, but not certain
3. No reason to think respondent used aid

**CfNmSc**

Now I'm going to ask you for the names of some people and things.

What do people usually use to cut paper?

1. Correct answer = scissors
2. Incorrect answer

### **CfNmCA**

What do you call the kind of prickly plant that grows in the desert?

INTERVIEWER: IF RESPONDENT MENTIONS NAME OF A PLANT AND YOU DON'T KNOW WHETHER IT IS A CACTUS PROMPT: WHAT TYPE OF PRICKLY PLANT IS THAT?

CODE AS CORRECT IF RESPONDENT SAYS 'CACTUS'

1. Correct answer = cactus or name of kind of cactus
2. Incorrect answer

### **CfNmQn**

Who is the reigning monarch now?

INTERVIEWER: ONLY ACCEPT ANSWERS CHARLES, KING CHARLES OR KING CHARLES III.

1. Correct answer = Charles, King Charles or King Charles III
2. Incorrect answer

(The program is updated to refer to the current monarch as soon as possible after there is a change of monarch)

### **CfNmPM**

Who is the Prime Minister now?

INTERVIEWER: PROBE FOR LAST NAME. CORRECT ANSWER IS SUNAK.

IF RESPONDENT MENTIONS **ONLY** FIRST NAME 'RISHI' THIS IS INCORRECT:

1. Correct answer = (last name) SUNAK
2. Incorrect answer

(The program is updated to refer to the current prime minister as soon as possible after there is a change of prime minister)

### **CfNmUS**

Who is the President of the United States right now?

INTERVIEWER: PROBE FOR LAST NAME. ANSWER IS BIDEN

IF RESPONDENT MENTIONS **ONLY** FIRST NAME 'JOE' THIS IS INCORRECT

1. Correct answer = (last name) Biden
2. Incorrect answer

(The program is updated to refer to the current president as soon as possible after there is a change of president)

IF Word memory test list read by computer or Word memory test list read by interviewer

[CFTest = 1 or 2]

### **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.

[^list of words]

INTERVIEWER: WRITE THE WORDS IN THE BOOKLET PROVIDED. ALLOW AS MUCH TIME AS THE RESPONDENT WISHES, UP TO 2 MINUTES. ENTER THE NUMBER OF WORDS THE RESPONDENT CORRECTLY RECALLS.

Range: 0..10

END OF FILTER

[CHECK CF3] CHECK: If entered a DK or RF answer [IF not (number of words recalled after delay = RESPONSE) OR (number of words recalled after delay = EMPTY)]

[IF not (CfLisD = RESPONSE OR CfLisD = EMPTY)]

INTERVIEWER: Please enter the number of words the respondent correctly recalls.

**CFLITA**  
**SHOWCARD H1**

The next task in this section is about comprehension. Please turn to card H1. This is a made-up medicine label and does not refer to a real medicine.

It is often difficult to read and understand instructions on medicine labels.

In a moment, I will ask you to read the card quietly to yourself. I will then ask you some questions about what it says.

You do not have to memorise the card, as you will be able to look at it while answering the questions.

INTERVIEWER: PLEASE GIVE THE RESPONDENT TIME TO READ THE SHOWCARD. IF NEEDED, CONFIRM THAT THEY DO NOT NEED TO READ THE LABEL OUT LOUD OR MEMORISE WHAT IT SAYS.

Press one and <Enter> to continue.

**CFLITSK**

INTERVIEWER: Is the respondent able to do the literacy test?

01 Yes

02 No - sight difficulties

03 No - health problems

04 No - other (Specify)

*IF whether able to do literacy test = No – Other reason*

*[CfLitSK = 4]*

**CFLITSO**

INTERVIEWER: Record other reason.

String 150

***[Open responses to CFLITSO were coded and then incorporated into CFLITSK. The full list of responses including additional categories from coding is in the table below.]***

Code	Description
1	Yes
2	No - sight difficulties
3	No - health problems
4	No - other
51	No - reading problems
52	No - deaf or hard of hearing
53	No - too tired
54	No - has other illness or physical impairment that affects ability to perform test
55	No - impaired concentration
56	No - very nervous or anxious
57	No - has other mental impairment
58	Refusal/ didn't want to take part
59	No - didn't know what to do/didn't understand task
60	No - distressed/ upset
61	No - under influence of alcohol
62	No - interruption or distraction, e.g. phone call or visitor

END OF FILTER	63	No - noisy environment
	85	Other answer - not codeable [code applied to all back-coded variables]
	86	Irrelevant answer - not codeable [code applied to all back-coded variables]

IF whether able to do literacy test = Yes

[CfLitSK = 1]

**CFLITB**

Looking at the card, what is the maximum number of days you may take this medicine?

INTERVIEWER: THE CORRECT RESPONSE IS 7. IF RESPONDS WITH 'ONE WEEK', PROBE FOR NUMBER OF DAYS. CODE WHETHER RESPONDENT GIVES CORRECT OR INCORRECT ANSWER.

01 Correct answer: seven

02 Incorrect answer: any other response

**CFLITC**

Looking at the card, list three situations for which you should consult a doctor.

INTERVIEWER: RESPONDENT SHOULD MENTION AT LEAST THREE OF THE FOLLOWING. STOP WHEN RESPONDENT MENTIONS THREE:

- (Before giving medication to children with) chicken pox
- (Before giving medication to children with) influenza
- Reyes syndrome
- (During) lactation
- (During) pregnancy,
- If symptoms persist
- (Accidental) overdose

INTERVIEWER: CODE WHETHER RESPONDENT GIVES CORRECT OR INCORRECT ANSWER.

01 Correct answer: at least three situations

02 Incorrect answer: any other response

**CFLITD**

Looking at the card, list one condition for which you might take the Medco tablet.

INTERVIEWER: RESPONDENT SHOULD MENTION AT LEAST ONE OF THE FOLLOWING AS CONDITIONS FOR WHICH YOU COULD TAKE THE TABLET:

- Headaches
- Muscle pains
- Rheumatic pains
- Toothache
- Earache
- Common cold

INTERVIEWER: CODE WHETHER RESPONDENT GIVES CORRECT OR INCORRECT ANSWER.

01 Correct answer: one correct condition

02 Incorrect answer: any other response

**CFLITE**

Looking at the card, list one condition for which you should not take the Medco tablet.

INTERVIEWER: RESPONDENT SHOULD MENTION AT LEAST ONE OF THE FOLLOWING AS CONDITIONS FOR WHICH YOU SHOULD NOT TAKE THE TABLET:

- Gastritis
- Peptic ulcer
- Taking anticoagulant drugs
- Serious liver illness
- Bronchial asthma

INTERVIEWER: CODE WHETHER RESPONDENT GIVES CORRECT OR INCORRECT ANSWER.

- 01 Correct answer: one correct condition
- 02 Incorrect answer: any other response

END OF FILTER

*IF numeracy question CFSUMB at last interview NA, DK or REF or EMPTY*  
*[IF ff\_CfSumB = 9991, 96 or 9999 or EMPTY]*

**CFNINT**

Next I would like to ask you some questions which assess how people use numbers in everyday life.

INTERVIEWER: IF NECESSARY, ENCOURAGE THE RESPONDENT TO TRY TO ANSWER EACH OF THE NUMERACY QUESTIONS.

Press <1> and <Enter> to 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?

- 01 £150
- 02 £100
- 03 £200
- 04 £250
- 05 £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?

- 01 100
- 02 10
- 03 90
- 04 900
- 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?

- 01 £9,000
- 02 £2,000
- 03 £3,000
- 04 £4,000
- 05 £8,000
- 06 £12,000
- 07 £18,000
- 95 Other answer
- 96 Doesn't know answer

*IF numeracy question set 1 = all incorrect*



[CfSumB<>Corr AND CfSumC<>Corr AND CfSumD<>Corr]

**CFSUMA**

If you buy a drink for 85 pence and pay with a one pound coin, how much change should you get back?

- 01 15 pence
- 02 25 pence
- 95 Other answer
- 96 Doesn't know answer

END OF FILTER

*IF numeracy set 1 = any correct*

[CfSumB=Corr OR CfSumC=Corr OR CfSumD=Corr]

**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?

- 01 £400,000
- 02 £200,000
- 03 £250,000
- 04 £500,000
- 95 Other answer
- 96 Doesn't know answer

END OF FILTER

*IF numeracy questions C, D or E = correct*

[CfSumC=Corr OR CfSumD=Corr OR CfSumE=Corr]

**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?"

- 01 £242
- 02 £202
- 03 £204
- 04 £210
- 05 £220
- 06 £240
- 95 Other answer
- 96 Doesn't know answer

END OF FILTER

END OF FILTER

**CFWHO**

INTERVIEWER: Was there anyone other than you and the respondent in the room while you were conducting the cognitive function tests?

- 1 No
- 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

**[Code maximum 4 out of 5 possible responses]**

**[Multiple responses to cfwho are recoded in variables CFWHONON CFWHOPAR CFWHOAD CFWHOCHI CFWHOOTH]**

**[CHECK CF4] CHECK:** IF whether anyone else was present = No AND whether anyone else was present = one of the yes responses.

**[IF (CfWho = 1) AND (CfWho = any 2 to 5)]**

INTERVIEWER: 'No' is an exclusive code. Please change!

Description	Variable	Archive
No	CfWho1	CFWHONON
Yes - respondent's spouse or partner	CfWho2	CFWHOPAR
Yes - other household member (adult)	CfWho3	CFWHOAD
Yes - other household member (child)	CfWho4	CFWHOCHI
Yes - not a household member	CfWho5	CFWHOOTH

### **CFIMP**

INTERVIEWER: Were there any factors that may have impaired the respondent's performance on the tests? Include any reasons for letter cancellation not attempted.

1 Yes

2 No

*IF whether other factors impaired performance = Yes*

*[CfImp = 1]*

### **CFWHATI**

What factors may have impaired the respondent's performance?

CODE ALL THAT APPLY

01 Blind or poor eyesight

02 Deaf or hard of hearing

03 Too tired

04 Has an illness or physical impairment that affects ability to perform the test

05 Impaired concentration

06 Nervous or anxious

07 Other mental impairment

08 Interruption or distraction – e.g. phone call or visitor

09 Noisy environment

10 Problems with the laptop

11 Had difficulty understanding English

12 Respondent refused/didn't want to take part

13 Distressed/upset e.g. from bereavement

14 Memory problems

15 Under the influence of alcohol

95 Other answer

**[Code maximum 16 out of 16 possible responses]**

**Multiple responses to CFWHATI are recoded in variables:**

Description	Variable	Archive
Blind or poor eyesight	CfWhat11	CFWHTEYE
Deaf or hard of hearing	CfWhat12	CFWHTHEA
Too tired	CfWhat13	CFWHTTIR
Has an illness or physical impairment that affects ability to perform the test	CfWhat14	CFWHTILL
Impaired concentration	CfWhat15	CFWHTCON
Nervous or anxious	CfWhat16	CFWHTNER
Other mental impairment	CfWhat17	CFWHTMEN
Interruption or distraction – eg phone call or visitor	CfWhat18	CFWHTDIS
Noisy environment	CfWhat19	CFWHTNOI
Problems with the laptop	CfWhat10	CFWHTLAP
Had difficulty understanding English	CfWhat11	CFWHTENG
Respondent refused/didn't want to take part	CfWhat12	CFWHTREF
Distressed/upset e.g. from bereavement	CfWhat13	CFWHTUPS
Memory problems	CfWhat14	CFWHTMEM
Under the influence of alcohol	CfWhat15	CFWHTALC
Other answer	CfWhat16	CFWHT95

*IF factor impairing performance = other*  
*[CFWHATI = 95]*

**CFWHATO**

INTERVIEWER: Give details of other factor that may have impaired the respondent's performance.

STRING[80]

**Answers to CFWHATO are backcoded and merged with the answers to CHWHATI in variables:**

Description	Variable	Archive
Blind or poor eyesight	CfWhatM1	CFWHTMEYE
Deaf or hard of hearing	CfWhatM2	CFWHTMHEA
Too tired	CfWhatM3	CFWHTMTIR
Has an illness or physical impairment that affects ability to perform the test	CfWhatM4	CFWHTMILL
Impaired concentration	CfWhatM5	CFWHTMCON
Nervous or anxious	CfWhatM6	CFWHTMNER
Other mental impairment	CfWhatM7	CFWHTMMEN
Interruption or distraction – eg phone call or visitor	CfWhatM8	CFWHTMDIS
Noisy environment	CfWhatM9	CFWHTMNOI
Problems with the laptop	CfWhat25	CFWHTMLAP
Had difficulty understanding English	CfWhat26	CFWHTMENG
Respondent refused/didn't want to take part	CfWhat27	CHWHTMREF
Distressed/upset e.g. from bereavement	CfWhat28	CFWHTMUPS
Memory problems	CfWhat29	CHWHTMMEM
Under the influence of alcohol	CfWhat30	CFWHTMALC
Other answer - not codeable 01 to 15	CfWhat31	CFWHTM85
Irrelevant response - not codeable 01 to 15	CfWhat32	CFWHTM86

END OF FILTER

END OF FILTER

**CFTSET**

INTERVIEWER: The Cognitive Function section is finished. Please enter 1 here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

# EXPECTATIONS MODULE (EX)

## EXEVNT

### SHOWCARD J1

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.

1 Press <1> and <Enter> to continue.

## EXRAIN

### SHOWCARD J1

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

## EXMOVHA

### SHOWCARD J1

What are the chances that you will move out of your current home at some time in the future?

INTERVIEWER: i.e. this person will change their permanent residence. Includes buying, renting, moving into a nursing home or other institution, current holiday home or going to live with someone else. Do not include moving between properties or living abroad some months of the year.

Range: 0..100

## EXLO80

### SHOWCARD J1

What are the chances that you will live to be [<sup>^Age1Txt</sup>] or more?

Range: 0..100

#### *Text description of [<sup>^Age1Txt</sup>]*

*IF aged 65 or under [IAgeof <= 65], <sup>^age1txt</sup> = 75.*

*ELSEIF aged 69 or under [IAgeof <= 69], <sup>^age1txt</sup> = 80.*

*ELSEIF aged 74 or under [IAgeof <= 74], <sup>^age1txt</sup> = 85.*

*ELSEIF aged 79 or under [IAgeof <= 79], <sup>^age1txt</sup> = 90.*

*ELSEIF aged 84 or under [IAgeof <= 84], <sup>^age1txt</sup> = 95.*

*ELSEIF aged 99 or under [IAgeof <= 99], <sup>^age1txt</sup> = 100.*

*ELSEIF aged 104 or under [IAgeof <= 104], <sup>^age1txt</sup> = 105.*

*ELSEIF aged 109 or under [IAgeof <= 109], <sup>^age1txt</sup> = 110.*

*ELSEIF aged 119 or under [IAgeof <= 119], <sup>^age1txt</sup> = 120.*

*IF age of respondent < 70 AND chances of living to be 11-15 years older > 0 or DK  
| [IAgeOf[PN0] < 70 and EXLO80 > or EXLO80 = DK]*

## EXLO90

### SHOWCARD J1

What are the chances that you will live to be 85 or more?

Range: 0..100

END OF FILTER

IF (respondent's age < 65)

[(IAgeOf < 65)]

**EXPW  
SHOWCARD J1**

Thinking about paid work in general [<sup>^</sup>,/and not just your present job] what are the chances that you will be working after you reach age [<sup>^</sup>AgeTxt]?

Range: 0..100

**Text description of [<sup>^</sup>AgeTxt]**

IF respondent's age <= 59 [IAgeof <= 59], <sup>^</sup>agetxt = 60

ELSEIF respondent's age <= 64 [IAgeof <= 64], <sup>^</sup>agetxt = 65.

IF (chances of working after reaching age AgeTxt > 0) OR (chances of working after reaching age AgeTxt = DK)

[ExpPW > 0 OR ExpPW = DK]

**EXPWF  
SHOWCARD J1**

If you **were** doing any paid work after you reached age [<sup>^</sup>AgeTxt], what are the chances that this would be for 35 hours a week or more, that is, full-time?

Range: 0..100

[Routing for textfill <sup>^</sup>AgeTxt same as for EXPW above]

END OF FILTER

END OF FILTER

IF ((chances of working after reaching age AgeTxt > 0) OR (chances of working after reaching age AgeTxt = DK)) OR respondent's age >=65 and respondent's age<70 [(ExpPW > 0 OR ExpPW = DK) OR (IAgeOf>=65 AND IAgeOf<70)]

**EXPW70  
SHOWCARD J1**

Thinking about paid work in general, what are the chances that you will be working after you reach age 70?

Range: 0..100

END OF FILTER

IF (chances of working after reaching age 70 > 0) OR (chances of working after reaching age 70 = DK) [ExpPW70 > 0 OR ExpPW70 = DK]

**EXPW70F  
SHOWCARD J1**

If you were doing any paid work after you reached age 70, what are the chances that it would be for 35 hours a week or more, that is, full time?

Range: 0..100

END OF FILTER

*IF (activities done in past month = paid work OR activities done in past month = self-employment OR status of unemployment in past month = temporarily away from paid work) AND respondent's age < 65  
[(WpAct = 1 OR WpAct = 2 OR WpAway = 1) AND IAgeOf < 65]*

**EXHLIM  
SHOWCARD J1**

What are the chances that your health will limit your ability to work before you reach age 65?  
Range: 0..100

END OF FILTER

**EXRSLF  
SHOWCARD J1**

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

*IF age < 75 [IAgeOf[PNo] < 75]*

**EXAINH  
SHOWCARD J1**

Including property and valuables, what are the chances that you will **receive** any inheritance during the next 10 years?  
Range: 0..100

*IF (expected inheritance > 0) OR (expected inheritance = DK)  
[ExAInh > 0 OR ExAInh = DK]*

**EXCINH  
SHOWCARD J1**

What are the chances that you will **receive** an inheritance totalling £10,000 or more during the next 10 years?  
Range: 0..100

*IF (expected inheritance over £10,000 = DK) OR (expected inheritance over £10,000 > 0)  
[ExCinh = DK OR ExCinh > 0]*

**EXINHE  
SHOWCARD J1**

What are the chances that you will **receive** an inheritance totalling £100,000 or more during the next 10 years?  
Range: 0..100

END OF FILTER

END OF FILTER

END OF FILTER

**EXCIN  
SHOWCARD J1**

Including property and other valuables that you [<sup>^</sup>BLANK / and your husband / wife / partner] might own, what are the chances that you [<sup>^</sup>BLANK / and your husband / wife / partner] will **leave** an inheritance totalling £50,000 or more?

Range: 0..100

*IF (chance of leaving an inheritance = RESPONSE) AND (chances of leaving an inheritance totalling £50,000 or more = 0) OR (chances of leaving an inheritance totalling £50,000 or more = DK)*

*[EXCIN = RESPONSE AND (ExCin = 0 OR ExCin = DK)]*

**EXCAIN**

**SHOWCARD J1**

What are the chances that you [**BLANK / and your husband / wife / partner**] will **leave** any inheritance?

Range: 0..100

END OF FILTER

*IF chances of leaving an inheritance totalling £50,000 or more > 0*

*[ExCin > 0]*

**EXCPIN**

**SHOWCARD J1**

What are the chances that you [**BLANK / and your husband / wife / partner**] will **leave** an inheritance totalling £150,000 or more?

Range: 0..100

END OF FILTER

*[CHECK EX1] CHECK: IF chance of leaving inheritance greater than £150,000 is higher than chance of leaving an inheritance of £50,000.*

*IF[ ExCpin >= ExCin]*

*The value entered at ExCpin must be less than or equal to the value entered at ExCin (^ExCin)*

*IF house tenure = own outright, buying with help of mortgage / loan, paying part rent part mortgage and institutional respondent <> Yes*

*[HoTenu = 1, 2, 3) AND (IAskInst[pnum] <> Yes)]*

**ExHVa** (see variable EXHVR for text fill)

**SHOWCARD J1**

What are the chances that the value of your house will [**text fill**] over the next year?

INTERVIEWER: Code 997 if respondent does not own their house.

Range: 0..997

**EXHVR** (computed variable)

Random allocation of text for ExHVa ("increase" or "decrease", "5" or "10" %)

1 Increase by 5%

2 Increase by 10%

3 Decrease by 5%

4 Decrease by 10%

*[CHECK EX2] CHECK: IF response given at EXHVR not a value between 0 -100 or 997*

*[ExHVa <> 0 - 100, 997]*

*[^Response to exhva] is not a valid answer! Please change!*

END OF FILTER



**EXNHEV**  
**SHOWCARD J1**

There is a lot of government interest currently in the issue of financing social care and nursing homes.

To help us understand this issue better it is important to understand whether people are expecting to pay for any future long-term care. We would like to ask you some questions about your expectations regarding future long-term care.

What are the chances that you will **ever** move to a **nursing home**?

INTERVIEWER: NURSING HOMES ARE INSTITUTIONS PRIMARILY FOR PEOPLE WHO NEED CONSTANT NURSE SUPERVISION OR ARE UNABLE TO LIVE INDEPENDENTLY. NURSING SUPERVISION MUST BE PROVIDED ON A CONTINUOUS BASIS FOR AN INSTITUTION TO QUALIFY AS A NURSING HOME. PROBE FOR ANSWER, ASK RESPONDENT TO IGNORE WHETHER THEY ACTUALLY WANT TO OR ARE PLANNING TO MOVE TO A NURSING HOME.

Range: 0..100

**EXSCEV**  
**SHOWCARD J1**

What are the chances that you will **ever** need **long term care at home** which is not provided by family or friends?

INTERVIEWER: LONG TERM CARE AT HOME INCLUDES CARE WITH PERSONAL OR DOMESTIC TASKS PROVIDED IN SOMEONE'S OWN HOME OR CARE PROVIDED AT A DAY CENTRE WHILE THEY ARE LIVING IN THEIR OWN HOME. PROBE FOR ANSWER, ASK RESPONDENT TO IGNORE WHETHER THEY ACTUALLY WANT TO OR ARE PLANNING TO RECEIVE LONG TERM CARE AT HOME.

Range: 0..100

**EXLTCEV**  
**SHOWCARD J1**

And what are the chances that you will **ever** have to **pay for long term care**, either in a nursing home or care received at home?

INTERVIEWER: PROBE FOR ANSWER, ASK RESPONDENT TO IGNORE WHETHER THEY ACTUALLY WANT TO OR ARE PLANNING TO PAY FOR LONG TERM CARE.

Range: 0..100

*IF respondent >= 60 years*

| *[IAgeof[spno] >= 60]*

| *IF chances of moving to a nursing home > 0*

| *[ExNHEv > 0]*

**EXMOVNB**  
**SHOWCARD J1**

What are the chances that you will move to a **nursing home in the next five years**?

INTERVIEWER: NURSING HOMES ARE INSTITUTIONS PRIMARILY FOR PEOPLE WHO NEED CONSTANT NURSE SUPERVISION OR ARE UNABLE TO LIVE INDEPENDENTLY. NURSING SUPERVISION MUST BE PROVIDED ON A CONTINUOUS BASIS FOR AN INSTITUTION TO QUALIFY AS A NURSING HOME.

Probe for answer, ask respondent to ignore whether they actually want to or are planning to move to a nursing home.

Range: 0..100

| END OF FILTER

END OF FILTER

*IF chances of needing **long term care** at home which is not provided by family or friends >0 AND IF respondent > = 60 years [lagespno]>=60]*

*[ExSCEv > 0]*

**EXCFV**

**SHOWCARD J1**

What are the chances that you will need **long term care at home** which is not provided by family or friends **in the next five years?**

INTERVIEWER: LONG TERM CARE AT HOME INCLUDES CARE WITH PERSONAL OR DOMESTIC TASKS PROVIDED IN SOMEONE'S OWN HOME OR CARE PROVIDED AT A DAY CENTRE WHILE THEY ARE LIVING IN THEIR OWN HOME.

PROBE FOR ANSWER, ASK RESPONDENT TO IGNORE WHETHER THEY ACTUALLY WANT TO OR ARE PLANNING TO RECEIVE LONG TERM CARE AT HOME.

Range: 0..100

*IF chances of ever having to pay for long term care >0 AND IF respondent > = 60 years [lagespno]>=60]*

*[ExLTCEv > 0]*

**EXLTC5**

**SHOWCARD J1**

What are the chances that you will have to **pay for long term care**, either in a nursing home or care received at home, **in the next 5 years?**

PROBE FOR ANSWER, ASK RESPONDENT TO IGNORE WHETHER THEY ACTUALLY WANT TO OR ARE PLANNING TO PAY FOR LONG TERM CARE.

Range : 0..100

END OF FILTER

END OF FILTER

**EXCND**

**SHOWCARD J2**

I'd now like you to think about **any** social care needs **you yourself** may have in the future. Have you thought about how to pay for your care and support needs?

INTERVIEWER: IF ASKED: You don't have to have done anything about it yet, we're interested in whether you've thought about it or not.

- 1 I've thought about it in great detail
- 2 I've thought about it a little
- 3 I know I should have thought about it but haven't done so yet
- 4 I haven't thought about this at all yet

**EXCPLN**

**SHOWCARD J3**

Have you done any of the things on this card to plan for your care needs?

INTERVIEWER: CODE ALL THAT APPLY

- 1 Taken out insurance, (e.g. to cover illness or inability to work)
- 2 Consulted a financial advisor
- 3 Started saving with the intention that it could be used for care
- 4 Bought property with the intention of using the money for care
- 95 Any other financial planning related to planning for care costs
- 96 None of these

*IF does not receive help from anyone listed at Cahfo (Home care worker/home help/ personal assistant OR A member of the reablement / intermediate care staff team OR Voluntary helper OR Warden / Sheltered housing manager OR Cleaner OR Council's handyman OR Member of staff at the care/nursing home OR Other help)  
[IF not 1, 2, 3, 4, 5, 6, 7 or 95 in CaHfO]*

**EXPFC  
SHOWCARD J4**

If you needed care and support which could not be provided by family or friends, how would your care be paid for. This could be care in your own home or in a residential or nursing home?

CODE ALL THAT APPLY

- 1 Local authority (social services)
- 2 NHS
- 3 Charity/religious organisation (e.g. Age UK)
- 4 Insurance policy (e.g. to cover illness or inability to work)
- 5 Private health insurance/health plan
- 6 Benefits (e.g. disability living allowance, personal independence payments)
- 7 Your own income from work, pensions or interest on investments
- 8 Your own savings
- 9 Sale of your assets (e.g. your home)
- 10 Relatives or friends
- 95 Other
- 96 SPONTANEOUS: None of these

***[code maximum of 11 out of 12 possible answers]***

<b>Description</b>	<b>Variable</b>	<b>Archive</b>
Local authority (social services)	EXPFC1	expfcla
NHS	EXPFC2	expfchs
Charity/religious organisation (e.g. Age UK)	EXPFC3	expfcch
Insurance policy (e.g. to cover illness or inability to work)	EXPFC4	expfcip
Private health insurance/health plan	EXPFC5	expfchi
Benefits (e.g. disability living allowance, personal independence payments)	EXPFC6	expfcsb
Your own income from work, pensions or interest on investments	EXPFC7	expfcoi
Your own savings	EXPFC8	expfcos
Sale of your assets (e.g. your home)	EXPFC9	expfcsa
Relatives or friends	EXPFC10	expfcrf
Other	EXPFC11	expfc95
SPONTANEOUS: None of these	EXPFC96	expfc96

END OF FILTER

*IF receives help from anyone listed at Cahfo (Home care worker/home help/ personal assistant OR A member of the reablement / intermediate care staff team OR Voluntary helper OR Warden / Sheltered housing manager OR Cleaner OR Council's handyman OR Member of staff at the care/nursing home OR Other help)  
[IF CaHfO = 1, 2, 3, 4, 5, 6, 7 or 95]*

**EXPCC  
SHOWCARD J4**

Thinking of your current and future care and support needs, how will your care be paid for. This could be care in your own home or in a residential or nursing home?

INTERVIEWER: IF ASKED: Please think about care which is not provided by family and friends.

CODE ALL THAT APPLY

- 1 Local authority (social services)
- 2 NHS
- 3 Charity/religious organisation (e.g. Age UK)
- 4 Insurance policy (e.g. to cover illness or inability to work)
- 5 Private health insurance/health plan
- 6 Benefits (e.g. disability living allowance, personal independence payments)
- 7 Your own income from work, pensions or interest on investments
- 8 Your own savings
- 9 Sale of your assets (e.g. your home)
- 10 Relatives or friends
- 95 Other
- 96 SPONTANEOUS: None of these

**[code maximum of 11 out of 12 possible answers]**

**Answers to EXPCC are recoded into separate variables:**

Description	Variable	Archive
Local authority (social services)	EXPCC1	expcc1a
NHS	EXPCC2	expcc2s
Charity/religious organisation (e.g. Age UK)	EXPCC3	expcc3c
Insurance policy (e.g. to cover illness or inability to work)	EXPCC4	expcc4i
Private health insurance/health plan	EXPCC5	expcc5h
Benefits (e.g. disability living allowance, personal independence payments)	EXPCC6	expcc6b
Your own income from work, pensions or interest on investments	EXPCC7	expcc7i
Your own savings	EXPCC8	expcc8s
Sale of your assets (e.g. your home)	EXPCC9	expcc9a
Relatives or friends	EXPCC10	expcc10f
Other	EXPCC11	expcc95
SPONTANEOUS: None of these	EXPCC96	expcc96

END OF FILTER

## EXRELA

### SHOWCARD J5

Looking at this card, please say how often you find you have too little money to spend on what you feel [^your / you and your household's] needs are?

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Most of the time

*IF having too little money to spend on needs = Rarely/ Sometimes/ Often/ Most of the time/ don't know/ refusal*

[EXRELA = 2,3,4,5, -8, -9]

## EXRELE

### SHOWCARD J6

Does having too little money stop you from doing any of the following things?

INTERVIEWER: Code all that apply.

- 1 Buy your first choices of food items
- 2 Have family and friends round for a drink or meal
- 3 Have an outfit to wear for social or family occasions
- 4 Keep your home in a reasonable state of decoration

- 5 Replace or repair broken electrical goods
- 6 Pay for fares or other transport costs to get to and from places you want to go
- 7 Buy presents for friends or family once a year
- 8 Take the sorts of holidays you want
- 9 Treat yourself from time to time
- 10 Keep your home warm enough during cold months
- 96 None of these

**[Code maximum 9 out of 10 possible responses]**

**Multiple responses to EXRELE are recoded in variables:**

Description	Variable	Archive
Buy your first choices of food items	EXRele1	EXRELEFO
Have family and friends round for a drink or meal	EXRele2	EXRELEME
Have an outfit to wear for social or family occasions	EXRele3	EXRELEOU
Keep your home in a reasonable state of decoration	EXRele4	EXRELEDE
Replace or repair broken electrical goods	EXRele5	EXRELEEL
Pay for fares or other transport costs to get to and from places you want to go	EXRele6	EXRELEFA
Buy presents for friends or family once a year	EXRele7	EXRELEPR
Take the sorts of holidays you want	EXRele8	EXRELEHO
Treat yourself from time to time	EXRele9	EXRELETR
None of these	EXRele96	EXRELE96

END OF FILTER

*[CHECK EX3] CHECK: IF selects "None of these" and any other response  
IF [(EXRELE =96) AND (EXRELE= any 1 to 9)]*

*INTERVIEWER: 'None of these' is an exclusive code, please amend.*

#### **EXTSET**

INTERVIEWER: The Expectations section is finished.

Please enter 1 here to make the program store the current time and date.

Range: 1..1

[Don't Know and Refusal are not allowed]

# EFFORT AND REWARD (OF VOLUNTEERING AND CARING) MODULE (ER)

## ERIN

I'd like now to ask you about voluntary work and helping others.

INTERVIEWER: Press <1> and <Enter> to continue.

Range : 1..1

## ERFVIN

INTERVIEWER: READ OUT SLOWLY:

First, I'd like you to think about any groups, clubs or organisations that you've been involved with during the last 12 months. That's anything you've taken part in, supported, or that you've helped in any way, either on your own or with others. Please exclude giving money and anything that was a requirement of your job

INTERVIEWER: Press <1> and <Enter> to continue.

Range : 1..1

## ERFVOL

### SHOWCARD K1

In the last 12 months, that is, since [*^date one year ago*], have you given any unpaid help to any groups, clubs or organisations in any of the ways shown on this card?

INTERVIEWER: CODE ALL THAT APPLY. PROBE 'What else?'

- 1 Raising or handling money/taking part in sponsored events
- 2 Leading the group/member of a committee
- 3 Organising or helping to run an activity or event
- 4 Visiting people
- 5 Befriending or mentoring people
- 6 Educating/teaching/coaching
- 7 Providing information/counselling
- 8 Secretarial, admin or clerical work
- 9 Providing transport/driving
- 10 Representing
- 11 Campaigning
- 12 Other practical help (e.g. helping out at school, shopping)
- 95 Any other help (PROBE FIRST)
- 96 None of these

### *Text description of [*^date one year ago*]*

*STR(TempDate.DAY)+ ' ' + MnTxt[MONTH(TempDate)] + ' ' + STR(TempDate.YEAR)*

**[Multiple responses to ERFVOL are recoded in variables: ERFVOLMO ERFVOLLE ERFVOLOR ERFVOLVI ERFVOLBE ERFVOLED ERFVOLIN ERFVOLSE ERFVOLTR ERFVOLRE ERFVOLCA ERFVOLPR ERFVOL95 ERFVOL96]**

Description	Variable	Archive
1 Raising or handling money/taking part in sponsored events	ErFVol1	ERFVOLMO
2 Leading the group/member of a committee	ErFVol2	ERFVOLLE
3 Organising or helping to run an activity or event	ErFVol3	ERFVOLOR
4 Visiting people	ErFVol4	ERFVOLVI
5 Befriending or mentoring people	ErFVol5	ERFVOLBE
6 Educating/teaching/coaching	ErFVol6	ERFVOLED
7 Providing information/counselling	ErFVol7	ERFVOLIN
8 Secretarial, admin or clerical work	ErFVol8	ERFVOLSE
9 Providing transport/driving	ErFVol9	ERFVOLTR

10 Representing	ErFVol10	ERFVOLRE
11 Campaigning	ErFVol11	ERFVOLCA
12 Other practical help (e.g. helping out at school, shopping)	ErFVol12	ERFVOLPR
95 Any other help (PROBE FIRST)	ErFVol95	ERFVOL95
96 None of these	ErFVol96	ERFVOL96

*[CHECK ER1] CHECK: IF selects "None of these" AND any other response option IF [ERFVOL =96 AND (ERFVOL =any 1 to 95)].  
"None of these' is an exclusive code for this question."*

*IF voluntary activities in the last year <> none*

*[ErFVol <> none]*

#### **ERFVOFT**

Overall, about how often over the last 12 months, since [*^date one year ago*], have you generally done something to help this/these organisation(s) – remember to include any time spent at home or elsewhere helping this/these organisation(s).

Would you say...

INTERVIEWER: READ OUT

- 1 ...at least once a week,
- 2 less than once a week but at least once a month,
- 3 or less often?
- 4 One-off activity

END OF FILTER

#### **ERIVIN**

Now I want to ask you about any unpaid help you, as an individual, may have given to other people, that is apart from any help given through a group, club or organisation. This could be help for a friend, neighbour or someone else, but not a relative.

INTERVIEWER: Press <1> and <Enter> to continue."

Range: 1..1

#### **ERIVOL**

SHOWCARD K2

In the last 12 months, that is, since [*^date one year ago*], have you done any of these things, unpaid, for someone who was not a relative?

INTERVIEWER: CODE ALL THAT APPLY

- 1 Keeping in touch with someone who has difficulty getting out and about (visiting in person, telephoning or emailing)
- 2 Doing shopping, collecting pension or paying bills
- 3 Cooking, cleaning, laundry, gardening or other routine household jobs
- 4 Decorating or doing any kind of home or car repairs
- 5 Babysitting or caring for children
- 6 Sitting with or providing personal care (washing, dressing) for someone who is sick or frail
- 7 Looking after a property or a pet for someone who is away
- 8 Writing letters or filling in forms
- 9 Representing someone (for example talking to a council department, or to a doctor)
- 10 Transporting or escorting someone (for example to a hospital or to an outing)
- 96 No help given in the past 12 months

***[Multiple responses to ERIVOL are recoded in variables ERIVOLKE ERIVOLSH ERIVOLCO ERIVOLDE ERIVOLBA ERIVOLPE ERIVOLPR ERIVOLWR ERIVOLRE ERIVOLTR ERIVOL96]***

Description	Variable	Archive
-------------	----------	---------

1 Keeping in touch with someone who has difficulty getting out and about (visiting in person, telephoning or emailing)	ErIVol1	Erivolke
2 Doing shopping, collecting pension or paying bills	ErIVol2	Erivolsh
3 Cooking, cleaning, laundry, gardening or other routine household jobs	ErIVol3	Erivolco
4 Decorating or doing any kind of home or car repairs	ErIVol4	Erivolde
5 Babysitting or caring for children	ErIVol5	Erivolba
6 Sitting with or providing personal care (washing, dressing) for someone who is sick or frail	ErIVol6	Erivolpe
7 Looking after a property or a pet for someone who is away	ErIVol7	Erivolpr
8 Writing letters or filling in forms	ErIVol8	Erivolwr
9 Representing someone (for example talking to a council department, or to a doctor)	ErIVol9	Erivolre
10 Transporting or escorting someone (for example to a hospital or to an outing)	ErIVol10	Erivoltr
96 No help given in the past 12 months	ErIVol96	Erivol96

**[CHECK ER2] CHECK:** IF selects "No help given in the past 12 months" AND any other response option.

IF [ERIVOL=96 AND (ERIVOL =any 1 to 10)]

"No help given' is an exclusive code for this question."

IF voluntary personal help <> none

[ErIVol <> none]

#### ERIVOFT

In the last 12 months, that is, since [^date one year ago], about how often have you done this kind of thing/all the things you have mentioned. Would you say...

INTERVIEWER: READ OUT

- 1 ...every day,
- 2 at least once a week,
- 3 less than once a week but at least once a month,
- 4 or less often?
- 5 One-off activity

END OF FILTER

IF (activities done in past month = voluntary work)

OR (frequency of doing voluntary work = RESPONSE AND frequency of doing voluntary work <>never) OR NOT(unpaid help offered to groups, clubs and organisations =none) OR NOT (unpaid help offered to non-relatives = none)  
 [WpAct = 3 OR (WpVW = RESPONSE AND WpVW<>6) OR NOT (ErFVol = 96) OR NOT (ErIVol = 96)]

#### ERINTV

I will now read a couple of statements that are related to your commitment towards voluntary work and helping other people. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each statement.

INTERVIEWER: Press <1> and <Enter> to continue.

Range: 1..1

#### ERVOLA

SHOWCARD K3

Considering all the efforts that I have put into my voluntary work or helping others, I am fully satisfied with what I have achieved so far.

Would you say that you strongly agree, agree, disagree or strongly disagree?



INTERVIEWER: PRESS <F9> FOR A DEFINITION OF 'voluntary work'.

HELP SCREEN F9: DEFINITION OF VOLUNTARY WORK:

Voluntary work is any unpaid activity intended to help or support an organisation or an individual unrelated to the respondent.

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

### **ERVOLB**

SHOWCARD K3

Considering all the efforts that I have put into my voluntary work, I have always received adequate appreciation from others.

(Would you say that you strongly agree, agree, disagree, or strongly disagree?)

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

END OF FILTER

*IF not in an institution [IAskInst <> Yes] (NB changed routing from W5 - no longer reliant on answer at work status question WpAct)*

### **ERCAA**

Did you look after anyone in the past week. This could be your partner or other people in your household or someone in another household?

INTERVIEWER: BY 'look after' WE MEAN THE ACTIVE PROVISION OF CARE.

INTERVIEWER: PLEASE INCLUDE CARE FOR GRANDCHILDREN

- 01 Yes
- 02 No

*IF whether looked after anyone in past week = Yes*

*[ErCAA = 1]*

### **ERCAB**

What relation is this person or people to you?

INTERVIEWER: 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

***[Code maximum 8 out of 8 possible responses]***

***Multiple responses to ERCAB are recoded in variables:***

<b>Description</b>	<b>Variable</b>	<b>Archive</b>
1 Spouse or partner	ErCAB1	ERCABSP
2 Child	ErCAB2	ERCABCH
3 Grandchild	ErCAB3	ERCABGC
4 Parent	ErCAB4	ERCABPA
5 Parent in law	ErCAB5	ERCABPL
6 Other relative	ErCAB6	ERCABOR

7 Friend or neighbour	ErCAB7	ERCABFR
95 Other	ErCAB95	ERCABOT

*IF (relationship to person / people = other)  
[ErCAB = 95]*

**ERCAX**

INTERVIEWER: Enter details of other person(s) who they cared for.  
String 60

**Open responses to ERCAX are coded and merged with the multiple responses to ERCAB. These merged responses are recoded in variables:**

Description	Variable	Archive
1 Spouse or partner	ErCABM1	ERCAMSP
2 Child	ErCABM2	ERCAMCH
3 Grandchild	ErCABM3	ERCAMGC
4 Parent	ErCABM4	ERCAMPA
5 Parent in law	ErCABM5	ERCAMPL
6 Other relative	ErCABM6	ERCAMOR
7 Friend or neighbour	ErCABM7	ERCAMFR
Other answer - not codeable 01 to 07	ErCABM85	ERCAM85
Irrelevant response - not codeable 01 to 07	ErCABM86	ERCAM86

END OF FILTER

*IF relationship to person cared for <> spouse or partner [ErCAB = 2,3,4,5,6,7,95]*

**ERCABNUM**

How many [**people[idx]**] did you look after in the past week?

**[Responses for each type of person recoded in variables:**

Description	Variable	Archive
1 Spouse or partner	ErCABNu1	ERCANSP
2 Child	ErCABNu2	ERCANCH
3 Grandchild	ErCABNu3	ERCANGC
4 Parent	ErCABNu4	ERCANSPA
5 Parent in law	ErCABNu5	ERCANSPL
6 Other relative	ErCABNu6	ERCANOR
7 Friend or neighbour	ErCABNu7	ERCANFR
Other answer - not codeable 01 to 07	ErCABNu8	ERCANOT

*PROGRAMMING NOTE: If ErCAB = 1 ErCABNu1 is computed as 1*

*[CHECK ER3] SIGNAL: IF has looked after more than 20 children in the past week*

*IF [(ERCAB Or ERCAX=2) AND ERCABNUM>20]*

*"/Are you sure the respondent looked after more than 20 children? Please amend, or explain in a note."*

*[CHECK ER4] SIGNAL: IF has looked after mor than 20 grandchildren in the past week*

IF [(ERCAB or ERCAX=3) AND ERCABNUM>20]  
"/Are you sure the respondent looked after more than 20 grandchildren?  
Please amend, or explain in a note."

**[CHECK ER5] SIGNAL:** IF has looked after more than 2 parents in the last week  
IF [(ERCAB or ERCAX=4) AND ERCABNUM>2]  
"/Are you sure the respondent looked after more than 2 parents? Please  
amend, or explain in a note."

**[CHECK ER6] SIGNAL:** If has looked after more than two parents-in-law in the  
last week  
IF [(ERCAB or ERCAX=5) AND ERCABNUM>2]  
"/Are you sure the respondent looked after more than 2 parents-in-law?  
Please amend, or explain in a note."

**[CHECK ER7] SIGNAL:** IF has looked after more than ten other relatives in the  
past week  
IF [(ERCAB or ERCAX=6) AND ERCABNUM>10]  
"/Are you sure the respondent looked after more than 10 other relatives?  
Please amend, or explain in a note."

**[CHECK ER8] SIGNAL:** IF looked after more than ten friends or neighbours in the  
past week.  
IF [(ERCAB or ERCAX=7) AND ERCABNUM>10]  
"/Are you sure the respondent looked after more than 10 friends or  
neighbours? Please amend, or explain in a note."

**[CHECK ER9] SIGNAL** IF looks after more than ten "other" people  
IF [(ERCAX=8) AND ERCABNUM>10]  
/ "/Are you sure the respondent | | | looked after more than 10 ^ErCAX? Please  
amend, or explain in a note."

END OF FILTER

**ERTOTNUM (archive: ERCANTT)**

Computed: Total number of people looked after in the past week  
0..99

IF number of people looked after in past week > 0 [ErTotNum > 0]

**ERCALIVE**

[^Does the person / Do any of the people] you care for live with you?

- 1 Yes
- 2 No

IF whether lives with person cared for = Yes  
[ErCALive = 1]

**ERCADPN**

INTERVIEWER: ENTER THE PERSON NUMBER OF EACH PERSON WHO  
WAS CARED FOR. INTERVIEWER: CODE ALL THAT APPLY.

- 1 [^Name of person living in household - [01]]
- 2 [^Name of person living in household - [02]]
- 3 [^Name of person living in household - [03]]
- 4 [^Name of person living in household - [04]]
- 5 [^Name of person living in household - [05]]
- 6 [^Name of person living in household - [06]]

- 7 [^Name of person living in household - [07]]
- 8 [^Name of person living in household - [08]]
- 9 [^Name of person living in household - [09]]
- 10 [^Name of person living in household - [10]]
- 11 [^Name of person living in household - [11]]
- 12 [^Name of person living in household - [12]]
- 13 [^Name of person living in household - [13]]
- 14 [^Name of person living in household - [14]]
- 15 [^Name of person living in household - [15]]
- 16 [^Name of person living in household - [16]]

**[Code maximum 16 out of 16 possible responses]**

**[Multiple responses to ERCADBPN are recoded in variables: ERCADP1  
ERCADP2ERCADP3 ERCADP4 ERCADP5 ERCADP6 ERCADP7 ERCADP8  
ERCADP9 ERCADP10 ERCADP11 ERCADP12 ERCADP13 ERCADP14  
ERCADP15 ERCADP16]**

**[CHECK ER10] CHECK: IF person number entered corresponds to the  
respondent's person number  
"/INTERVIEWER: Please check your coding. You have coded that the person  
has cared for themselves."**

END OF FILTER

END OF FILTER

#### **ERCAC**

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

INTERVIEWER: IF 'all the time', ENTER 168.

Range: 0..168

END OF FILTER

*IF (activities done in past month = voluntary work or cared for someone) OR whether  
looked after someone in the past week = yes  
[(WpAct = 3,4) OR (ErCAA = 1)]*

#### **ERVOLCAR**

Earlier in the interview you told me that you had [^cared for someone in the last  
month/ cared for someone in the last week].

INTERVIEWER: Press <1> and <Enter> to continue.

END OF FILTER

#### **ERRESIN**

Some people have extra responsibilities because they look after someone who has  
long-term physical or mental ill health or disability, or problems related to old age.

INTERVIEWER: Press <1> and <Enter> to continue.

Range: 1..1

#### **ERRESCK\***

May I check, is there anyone (living with [^you/name]/not living with [^you/name])  
who is sick, disabled or frail whom [^you look/he/she looks] after or [^give/gives]  
special help to, other than in a professional capacity (for example, a sick or disabled  
(or elderly) relative/husband/wife/child/friend/parent, etc)?

INTERVIEWER: CODE NO IF GIVES FINANCIAL HELP ONLY.

INTERVIEWER: CODE YES IF RESPONDENT GIVES ANY HELP OF THIS KIND EVEN IF ALREADY MENTIONED EARLIER IN INTERVIEW..

- 1 Yes
- 2 No

*IF give help to others = yes*

*[ERResCk = 1]*

**ERRESNM**

How many people do you provide this kind of help and support to?

Range: 0..20

**ERAGEC**

How old [*is this person/are these people*] who you provide this type of help to?

INTERVIEWER: CODE ALL THAT APPLY TO RECORD THE AGES OF EVERYONE THE RESPONDENT HELPS.

- 1 Aged 0-15 years
- 2 Aged 16-64 years
- 3 Aged 65 and over

Description	Variable	Archive
1 Aged 0-15 years (child)	ErAgeC1	ErAgeC1
2 Aged 16-64 years (adult)	ErAgeC2	ErAgeC2
3 Aged 65 and over (Older)	ErAgeC3	ErAgeC3

*[CHECK ER11] CHECK: IF only looks after one person but selects multiple age groups*

*IF ERRESNM=1 AND ERAGEC is more than one category*

*"INTERVIEWER: Can only select 1 age group as answer to number of people helped is 1. Please amend either ErResNm or ErAgeC"*

*IF age of person/people provide help to = child*

*[ErAgeC = 1]*

**ERCHLD**

SHOWCARD K4

How many hours did you spend helping the [*person/people aged 0 to 15*] in the last week?

INTERVIEWER: EXPLAIN IF NECESSARY: Not help over the phone or by internet, or doing occasional errands or odd jobs without the respondent.

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours'

INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK 'So that is xx hours in the last week?', CHANGE ANSWER IF NECESSARY

- 1 No help in the last week
- 2 Less than one hour
- 3 1-4 hours
- 4 5-9 hours
- 5 10-19 hours
- 6 20-34 hours
- 7 35-49 hours
- 8 50-99 hours
- 9 100 hours or more

END OF FILTER

*IF age of person/people provide help to = adult*

[ErAgeC = 2]

**ERADLT**

SHOWCARD K4

How many hours did you spend helping the [*person/people aged 16 to 64*] in the last week?

INTERVIEWER EXPLAIN IF NECESSARY: Not help over the phone or by internet, or doing occasional errands or odd jobs without the respondent.

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours'

INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK 'So that is xx hours in the last week?', CHANGE ANSWER IF NECESSARY

- 1 No help in the last week
- 2 Less than one hour
- 3 1-4 hours
- 4 5-9 hours
- 5 10-19 hours
- 6 20-34 hours
- 7 35-49 hours
- 8 50-99 hours
- 9 100 hours or more

END OF FILTER

*IF age of person/people provide help to = older*

[ErAgeC = 3]

**EROLDR**

SHOWCARD K4

How many hours did you spend helping the [*person/people aged 65 or over*] in the last week?

INTERVIEWER EXPLAIN IF NECESSARY: Not help over the phone or by internet, or doing occasional errands or odd jobs without the respondent.

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours'

INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK 'So that is xx hours in the last week?', CHANGE ANSWER IF NECESSARY "

- 1 No help in the last week
- 2 Less than one hour
- 3 1-4 hours
- 4 5-9 hours
- 5 10-19 hours
- 6 20-34 hours
- 7 35-49 hours
- 8 50-99 hours
- 9 100 hours or more

END OF FILTER

*IF cares for any of the three age groups 19+ hours per week*

LOOP ERRESBK ERRESRY ERRESER to ask for each age group cared for separately, based on ERAGEC and hours cared for that group from ERCHLD, ERADLT, EROLDLDR  
 [(ERAGEC=1 and ERCHLD>05) or (ERAGEC=2 and ERADLT>05) or (ERAGEC=3 and EROLDLDR>05)]

**ERRESBK\*** (See above)

If [^you/name] wanted a break for a few hours (during the time you would usually look after the [^person aged 0-15 \ people aged 0-15\ person aged 16-64\ people aged 16-64\ person aged 65 or over\ people aged 65 or over] would someone else have to look after him/her?

- 1 Yes, someone else needed
- 2 No

IF need another care giver = yes [ERResBK = 1]

**ERRESRY** (See above)

Is there anyone whom you could rely on to look after him/her either at home or elsewhere?

- 1 Yes
- 2 No

**ERRESER**

SHOWCARD K5

In the last year have you made use of any of the following in order to give you a break?

INTERVIEWER: CODE ALL THAT APPLY.

- 1 A sitting service to allow you to go out for a couple of hours
- 2 A befriending service - where a volunteer takes the person you care for out for the day
- 3 Day-care at a social day centre or hospital
- 4 In-home respite where a care worker comes to the home for a few hours
- 5 Overnight respite where the person you care for stays elsewhere
- 6 Overnight respite where a care worker comes and stays in the home
- 96 None of these

END OF FILTER

**[Multiple responses to ERRESER are recoded in variables: ERRESERS1 ERRESERB1 ERRESERD1 ERRESERI1 ERRESERO1 ERRESERH1 ERRESERN1 ERRESERS2 ERRESERB2 ERRESERD2 ERRESERI2 ERRESERO2 ERRESERH2 ERRESERN2 ERRESERS3 ERRESERB3 ERRESERD3 ERRESERI3 ERRESERO3 ERRESERH3 ERRESERN3]**

Description	Variable	Archive
<b>Child</b>		
A sitting service to allow you to go out for a couple of hours	ErResEr1	ERRESERS1
A befriending service - where a volunteer takes the person you care for out for the day	ErResEr2	ERRESERB1
Day-care at a social day centre or hospital	ErResEr3	ERRESERD1
In-home respite where a care worker comes to the home for a few hours	ErResEr4	ERRESERI1
Overnight respite where the person you care for stays elsewhere	ErResEr5	ERRESERO1
Overnight respite where a care worker comes and stays in the home	ErResEr6	ERRESERH1

None of these	ErResEr9	ERRESERN1
<b>Adult</b>		
A sitting service to allow you to go out for a couple of hours	ErResEr7	ERRESERS2
A befriending service - where a volunteer takes the person you care for out for the day	ErResEr8	ERRESERB2
Day-care at a social day centre or hospital	ErResE10	ERRESERD2
In-home respite where a care worker comes to the home for a few hours	ErResE11	ERRESERI2
Overnight respite where the person you care for stays elsewhere	ErResE12	ERRESERO2
Overnight respite where a care worker comes and stays in the home	ErResE13	ERRESERH2
None of these	ErResE14	ERRESERN2
<b>Older</b>		
A sitting service to allow you to go out for a couple of hours	ErResE15	ERRESERS3
A befriending service - where a volunteer takes the person you care for out for the day	ErResE16	ERRESERB3
Day-care at a social day centre or hospital	ErResE17	ERRESERD3
In-home respite where a care worker comes to the home for a few hours	ErResE18	ERRESERI3
Overnight respite where the person you care for stays elsewhere	ErResE19	ERRESERO3
Overnight respite where a care worker comes and stays in the home	ErResE20	ERRESERH3
None of these	ErResE21	ERRESERN3

*[CHECK ER12] CHECK: IF selects "None of these" AND any other response  
IF[ERRESER=96 AND (ERRESER =any 1 to 6)]  
"INTERVIEWER: 'None of these' is an exclusive code"*

END OF FILTER

*IF respite used = a sitting service, befriending service, day care or daytime home respite [(ERRESER =1,2,3 4)] in any of the three loops of ERRESER.*

*ASK ONCE – NO LOOP*

*[ERResCk=1 AND Any(1, ErResEr1, ErResEr2, ErResEr3, ErResEr4) OR any(1, ErResEr7, ErResEr8, ErResE10,ErResE11) OR any(1, ErResE15, ErResE16, ErResE17, ErResE18)]*

**ERRESOF**

How often do you use any of these services that involves daytime respite...

INTERVIEWER: READ OUT

INTERVIEWER: THINKING OF RESPONDENT'S USE OF THESE SERVICES

- 1 at least once a week,
- 2 once or twice a month,
- 3 6-11 times a year,
- 4 1-5 times a year,
- 5 or less than once a year?

END OF FILTER



*IF respite used = overnight respite elsewhere or overnight respite in own home  
[(ERReSer= 5,6)] in any of the three loops of ERRESER.*

*ASK ONCE – NO LOOP*

*[ ERResCk=1 and any(1, ErResEr5,ErResEr6) OR any(1,ErResE12,  
ErResE13) OR any(1, ErResE19,ErResE20)]*

**ERRESO**

How often do you use a service that involves overnight respite...

INTERVIEWER: READ OUT

- 1 ...at least once a week,
- 2 once or twice a month,
- 3 6-11 times a year,
- 4 1-5 times a year,
- 5 or less than once a year?

END OF FILTER

END OF FILTER

*IF (activity in the last month = caring or looking after someone in the last week = yes)  
OR (caring for others = yes) OR (caring for someone in the household = yes)  
[(WpAct = 4) OR (ERCAA = 1) OR (ERResCk = 1)]*

**ERINCAR**

I would now like to ask you about help that you may have given, as an individual, to anyone including your partner or other people in your household.

I will now read a couple of statements that are related to your commitment towards other people. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each statement.

INTERVIEWER: Press <1> and <Enter> to continue.

Range : 1..1

**ERCARA**

SHOWCARD K3

Considering all the efforts that I have put into caring for someone, I am fully satisfied with what I have achieved so far.

(Would you say that you strongly agree, agree, disagree, or strongly disagree?)

- 01 Strongly agree
- 02 Agree
- 03 Disagree
- 04 Strongly disagree

**ERCARB**

SHOWCARD K3

Considering all the efforts that I have put into caring for someone, I have always received adequate appreciation from others.

(Would you say that you strongly agree, agree, disagree, or strongly disagree?)

- 01 Strongly agree
- 02 Agree
- 03 Disagree
- 04 Strongly disagree

END OF FILTER

## 10.1. Grandparenting Section

*IF has more than one grandchild*

*[DIGNMY > 1]*

**CAHGOA**

I would now like to ask you about time spent looking after your grandchildren.  
How old is your oldest grandchild?

INTERVIEWER: RECORD AGE IN YEARS

INTERVIEWER: IF GRANDCHILD IS LESS THAN A YEAR OLD CODE '0'.

*[CHECK ER13] SIGNAL: If oldest grand-child is older than 45*

*"A IF[CAHGOA>45]*

*"Are you sure? ^CAHGOA is quite old. Please check."*

**CAGYA**

How old is your youngest grandchild?

INTERVIEWER: RECORD AGE IN YEARS

INTERVIEWER: IF GRANDCHILD IS LESS THAN A YEAR OLD CODE '0'.

*[CHECK ER14] SIGNAL: If youngest grand-child is older than 45*

*"A IF[CAGYA>45]*

*"Are you sure? ^CAGYA is quite old. Please check."*

*[CHECK ER15] SIGNAL: IF youngest grand-child older than oldest grandchild*

*IF (CAGYA > CAHGOA)*

*"INTERVIEWER: The age of the youngest grandchild cannot be higher than the age of the oldest grandchild (^CAHGOA) entered in the previous question. Please check your coding!"*

END OF FILTER

*IF has only one grandchild*

*[DIGNMY = 1]*

**CAGLA**

I would now like to ask you about time spent looking after your grandchild.  
How old is your grandchild?

INTERVIEWER: RECORD AGE IN YEARS

INTERVIEWER: IF GRANDCHILD IS LESS THAN A YEAR OLD CODE '0'.

*[CHECK ER16] SIGNAL: IF CAGLA <= 45*

*"Are you sure? ^CAGLA is quite old. Please check."*

END OF FILTER

*IF has one or more grandchild(ren)*

*[DIGNMY >= 1]*

**CAGLK**

Thinking about [*^your grandchild/all of your grandchildren*], during the last twelve months have you looked after [*^your grandchild/any of your grandchildren*] without their parents being present?

01 Yes

02 No

END OF FILTER

*IF yes to looking after grandchildren in previous 12 months*

*[CAGLK=1]*

**CAGLKT**

Thinking about all the time that you spend looking after grandchildren, has this been...

INTERVIEWER: READ OUT AND CODE ALL THAT APPLY

01 During school terms – weekdays

02 During school terms – weekends

03 During school holidays

04 Throughout the whole year

05 Difficult to say

Description	Variable	Archive
During school terms – weekdays	CAGLKT1	CAGLKTWK
During school terms – weekends	CAGLKT2	CAGLKTWE
During school holidays	CAGLKT3	CAGLKTTHO
Throughout the whole year	CAGLKT4	CAGLKTYSR
Difficult to say	CAGLKT5	CAGLKTDS

*IF looks after grandchildren during school terms – weekdays*

*[CAGLKT=1]*

**CAGTWD**

During school terms on weekdays, has this mostly been...

INTERVIEWER: READ OUT

INTERVIEWER: IF PARTICIPANT ASKS, WE WANT THEM TO ANSWER BASED ON THEIR CURRENT ARRANGEMENTS 01 4 to 5 days a week

02 2 to 3 days a week

03 one day a week

04 Less often than one day a week

**CAGTWDA**

On average, how long do you spend looking after them on a typical day during this period?

INTERVIEWER: RECORD THE NUMBER OF HOURS

END OF FILTER

*IF looks after grandchildren during school terms – weekends*

*[CAGLKT=2]*

**CAGTWE**

During school terms on weekends, has this mostly been...

INTERVIEWER: READ OUT

01 Every weekend

02 Every other weekend

03 Less often

**CAGTWEA**

On average, how long do you spend looking after them on a typical day during this period?

INTERVIEWER: RECORD THE NUMBER OF HOURS

END OF FILTER

*IF looks after grandchildren during school holidays*

[CAGLKT=3]

**CAGHOL**

During school holidays, has this mostly been...

INTERVIEWER: READ OUT

01 4 to 7 days a week

02 2 to 3 days a week

03 1 day a week

04 Up to a few days a month but not each week

05 Less often than once a month

**CAGHOA**

On average, how long do you spend looking after them on a typical day during this period?

INTERVIEWER: RECORD THE NUMBER OF HOURS

END OF FILTER

*IF looks after grandchildren throughout the whole year*

[CAGLKT=4]

**CAGTY**

Throughout the whole year, has this mostly been...

INTERVIEWER: READ OUT

01 4 to 7 days a week

02 2 to 3 days a week

03 1 day a week

04 Up to a few days a month but not each week

05 Less often than once a month

**CAGTYA**

On average, how long do you spend looking after them on a typical day during this period?

INTERVIEWER: RECORD THE NUMBER OF HOURS

END OF FILTER

*IF difficult to say when looks after grandchildren*

[CAGLKT=5]

**CAGDIF**

But would you say this has mostly been...

INTERVIEWER: READ OUT

01 4 to 7 days a week

02 2 to 3 days a week

03 1 day a week

04 Up to a few days a month but not each week

05 Less often than once a month

06 Don't know

*IF mentioned a frequency of looking after grandchildren*

*[CAGDIF= 1 to 5]*

**CAGDIFA**

On average, how long do you spend looking after them on a typical day during this period?

INTERVIEWER: RECORD THE NUMBER OF HOURS

END OF FILTER

END OF FILTER

**CAGACT**

SHOWCARD K6

Now thinking about what you do when you are looking after grandchildren, have you done any of the things on this card?

INTERVIEWER: CODE ALL THAT APPLY. PROBE: What else?

- 01 Had [*^grandchild/grandchildren*] to stay overnight without [*^his/her/their*] parents
- 02 Looked after [*^your grandchild/any of your grandchildren*] when they are ill
- 03 Played with your [*^grandchild/grandchildren*] and/or took part in leisure activities with [*^him/her/them*]
- 04 Prepared meals for your [*^grandchild/grandchildren*]
- 05 Helped your [*^grandchild/grandchildren*] with [*^his/her/their*] homework
- 06 Taken your [*^grandchild/grandchildren*] to, or collected [*^him/her/them*] from nursery, playgroup or school
- 07 Just been around in case [*^he/she/they*] need me for anything
- 96 None of these

Description	Variable	Archive
Had grandchild[ren] to stay overnight without parents	CAGACT1	CAGACTSO
Looked after grandchild[ren] when they are ill	CAGACT2	CAGACTIL
Played with your grandchild[ren] and/or took part in leisure activities with them	CAGACT3	CAGACTLE
Prepared meals for your grandchild[ren]	CAGACT4	CAGACTME
Helped your grandchild[ren] with their homework	CAGACT5	CAGACTHW
Taken your grandchild[ren] to, or collected them from nursery, playgroup or school	CAGACT6	CAGACTPU
Just been around in case they need me for anything	CAGACT7	CAGACTAR
None of these	CAGACT96	CAGACT96

*IF had grandchildren stay overnight without parents*

*[CAGACT=1]*

**CAGACTA**

You said you had [*^grandchild/grandchildren*] to stay overnight without [*^his/her/their*] parents. Was this...

INTERVIEWER: READ OUT

- 01 Frequently
- 02 Occasionally
- 03 Rarely

END OF FILTER

*IF looked after grandchildren when ill*

*[CAGACT=2]*

**CAGACTB**

Was this...

INTERVIEWER: READ OUT

01 Frequently

02 Occasionally

03 Rarely

END OF FILTER

*IF played with your grandchildren and/or took part in leisure activities with them*

*[CAGACT=3]*

**CAGACTC**

Was this...

INTERVIEWER: READ OUT

01 Frequently

02 Occasionally

03 Rarely

END OF FILTER

*IF prepared meals for grandchildren*

*[CAGACT=4]*

**CAGACTD**

Was this...

INTERVIEWER: READ OUT

01 Frequently

02 Occasionally

03 Rarely

END OF FILTER

*IF helped grandchildren with homework*

*[CAGACT=5]*

**CAGACTE**

Was this...

INTERVIEWER: READ OUT

01 Frequently

02 Occasionally

03 Rarely

END OF FILTER

*IF taken/collected grandchildren from, nursery, playgroup or school*

*[CAGACT=6]*

**CAGACTF**

Was this...

INTERVIEWER: READ OUT

01 Frequently

02 Occasionally

03 Rarely

END OF FILTER

*IF just been around in case grandchildren need me for anything*

*[CAGACT=7]*

**CAGACTG**

Was this...

INTERVIEWER: READ OUT

01 Frequently

02 Occasionally

03 Rarely

END OF FILTER

**CAGWHY**

SHOWCARD K7

People look after their grandchildren for many reasons. What would you say were your main reasons for doing this?

INTERVIEWER: CODE ALL THAT APPLY. PROBE: What else?

01 To help them develop as people

02 It keeps me young and active

03 It makes me feel engaged with young people

04 To help his/her/their parents go out to work

05 To give his/her/their parents a break

06 To give my grandchild/grandchildren a break

07 So his/her/their parents can go out in the evening

08 To help out financially

09 Our family prefers family care

10 It is difficult for me to refuse

95 Other reason (SPECIFY)

96 None of these

Description	Variable	Archive
To help them develop as people	CAGWHY1	CAGWHYDV
It keeps me young and active	CAGWHY2	CAGWHYAC
It makes me feel engaged with young people	CAGWHY3	CAGWHYEN
To help his/her/their parents go out to work	CAGWHY4	CAGWHYWK
To give his/her/their parents a break	CAGWHY5	CAGWHYPB
To give my grandchild/grandchildren a break	CAGWHY6	CAGWHYGB
So his/her/their parents can go out in the evening	CAGWHY7	CAGWHYPO
To help out financially	CAGWHY8	CAGWHYFI
Our family prefers family care	CAGWHY9	CAGWHYFA
It is difficult for me to refuse	CAGWHY10	CAGWHYDF
Other reason	CAGWHY95	CAGWHY95
None of these	CAGWHY96	CAGWHY96

*IF looks after grandchildren for other reason*

*[CAGWHY=95]*

**CAGWHYO**

INTERVIEWER WRITE IN OTHER REASON

String (60)

END OF FILTER

**[Multiple responses to CAGWHYO are recoded in variables:**

<b>Description</b>	<b>Variable</b>	<b>Archive</b>
Reasons for looking after grandchildren: to help them develop as people (merged)	CAGWHM1	CAGWHYMDV
Reasons for looking after grandchildren: it keeps me young and active (merged)	CAGWHM2	CAGWHYMAC
Reasons for looking after grandchildren: it makes me feel engaged with young people (merged)	CAGWHM3	CAGWHYMEN
Reasons for looking after grandchildren: to help his/her/their parents go out to work (merged)	CAGWHM4	CAGWHYMWK
Reasons for looking after grandchildren: to give his/her/their parents a break (merged)	CAGWHM5	CAGWHYMPB
Reasons for looking after grandchildren: to give my grandchild/grandchildren a break (merged)	CAGWHM6	CAGWHYMGB
Reasons for looking after grandchildren: so his/her/their parents can go out in the evening (merged)	CAGWHM7	CAGWHYMPO
Reasons for looking after grandchildren: to help out financially (merged)	CAGWHM8	CAGWHYMF1
Reasons for looking after grandchildren: our family prefers family care (merged)	CAGWHM9	CAGWHYMF2
Reasons for looking after grandchildren: it is difficult for me to refuse (merged)	CAGWHM10	CAGWHYMDF
Reasons for looking after grandchildren: out of love for them (merged)	CAGWHM11	CAGWHMLV
Reasons for looking after grandchildren: because I enjoy spending time with them (merged)	CAGWHM12	CAGWHMEJ
Reasons for looking after grandchildren: to keep them occupied (merged)	CAGWHM13	CAGWHMOC
Reasons for looking after grandchildren: other answer - not codeable (merged)	CAGWHM85	CAGWHM85
Reasons for looking after grandchildren: reasons for looking after grandchildren: irrelevant response - not codeable (merged)	CAGWHM86	CAGWHM86
Reasons for looking after grandchildren: reasons for looking after grandchildren: none of these (merged)	CAGWHM96	CAGWHM96

END OF FILTER

**ErEndEr**

End of voluntary work and helping section

Please press 1 to continue

Range: 1..1



# PSYCHOSOCIAL MODULE (PS)

## **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.

1 Press <1> and <Enter> to continue.

## **PSCEDA**

(Much of the time during the past week), you felt depressed?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

## **PSCEDB**

(Much of the time during the past week), you felt that everything you did was an effort?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

## **PSCEDC**

(Much of the time during the past week), your sleep was restless?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

## **PSCEDD**

(Much of the time during the past week), you were happy?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

## **PSCEDE**

(Much of the time during the past week), you felt lonely?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

## **PSCEDF**

(Much of the time during the past week), you enjoyed life?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

## **PSCEDG**

(Much of the time during the past week), you felt sad?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No

## **PSCEDH**

(Much of the time during the past week), you could not get going?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

01 Yes

02 No



# FINAL QUESTIONS MODULE (FQ)

## FQNR\*

[^Now I have some final questions before we reach the end of the interview / Now I have some final questions about [^your / [^name's]] background]

1 Press <1> and <Enter> to continue.

*IF information about ethnic group not given at Wave 10 (NA, DK, REF, New Partner)  
FF\_FQEthnic =9991, 9998, 9999, empty*

### **FQETHNIC\***

#### **SHOWCARD L1**

Can I check, what is about [^your / [^name's]] ethnic group?

INTERVIEWER: Code one only.

- 1 White
- 2 Mixed ethnic group
- 3 Asian / Asian British
- 4 Black / African / Caribbean / Black British
- 95 Other ethnic group

*IF ethnic group = White [FQETHNIC= 1]*

#### **FQETHWhite\***

Which one best describes [^your / [^name's]] White ethnic group or background.

Is it...READ OUT...

- 1 ... English / Welsh / Scottish / Northern Irish/ British
- 2 ... Irish
- 3 ... Gypsy or Irish Traveller
- 4 ... Roma
- 95 ... Or any other White background?

END OF FILTER

*IF ethnic group = Mixed Ethnic Group [FQETHNIC= 2]*

#### **FQETHMixed\***

Which one best describes [^your / [^name's]] Mixed or multiple ethnic group or background. Is it...READ OUT...

- 01 ... White and Black Caribbean
- 02 ... White and Black African
- 03 ... White and Asian
- 95 ... Or any other Mixed / multiple ethnic background?

END OF FILTER

*IF ethnic group = Asian or Asian British [FQETHNIC= 3]*

#### **FQETHAsian\***

Which one best describes [^your / [^name's]] Asian or Asian British ethnic group or background. Is it... READ OUT...

- 01 ... Indian
- 02 ... Pakistani
- 03 ... Bangladeshi
- 04 ... Chinese
- 95 ... any other Asian background?

END OF FILTER

*IF ethnic group = Black OR Black British [FQETHNIC= 4]*

**FQETHBlack\***

Which one best describes [*^your / ^name's*] Black, Black British, Caribbean or African ethnic group or background. Is it... READ OUT...

01 ... Caribbean

02 ... African background

95 ... Or any other Black, Black British, or Caribbean background

END OF FILTER

*IF ethnic group = other [FQETHNIC= 95]*

**FQETHOther\***

Which one best describes [*^your / ^name's*] other ethnic group or background? Is it...READ OUT...

01 ... Arab

95 ... Or any other ethnic group

END OF FILTER

*IF country of birth not given at last interview (NA, DK, Ref, New Partner) [FF\_FqCbth= 9991, 9998, 9999, empty]*

*(consolidated variable FQCBTHM – which merges current and previous wave data – is archived under SL; recoded variable FQCBTHMR – which recodes FQCBTHM into UK and non-UK – is archived under EUL)*

**FQCBTH\***

In which country [*^were you / was ^name*] born?

01 England

02 Scotland

03 Wales

04 Northern Ireland

05 Republic of Ireland

06 Elsewhere outside of UK

END OF FILTER

*IF (Country of birth = RESPONSE AND Country of birth <> England) AND country of birth not given at last interview (DK, Ref, NA, empty, blank) [FqCbth = RESPONSE AND FqCbth <> 1 AND (FF\_FqCEng = 9991 (-1) , 9999 (-9), 9998 (-8))]*

*(consolidated variable FQCENGM – which merges current and previous wave data – is archived under EUL)*

**FQCENG\***

In what year did [*^you / ^name*] come to live in England?

INTERVIEWER: Write in year.

Range: 1900..2050

**[CHECK FQ1] CHECK:** IF (year of interview < year of coming to live in England)

IF [IntDat.YEAR < FqCeng]

INTERVIEWER: This year is in the future (^Response to Fqceng)! Please change!

**[CHECK FQ2] CHECK:** IF year of coming to live in England is before person's year of birth

[IF[FqCeng< IDoB[PNum].YEAR]  
INTERVIEWER: This is before [^Name] was born! Please check!

END OF FILTER

**FQCITZN\***  
**SHOWCARD L2**

Which of the places on this card [^are/is] [^you/[^name]] a citizen of, or [^do you / does [^name]] hold a passport for?

INTERVIEWER: RECORD AS A CITIZEN EVEN IF THEY DO NOT HOLD A PASSPORT, NOTE IT IS NOT POSSIBLE TO HOLD A PASSPORT UNLESS THEY ARE A CITIZEN.

INTERVIEWER: CODE ALL THAT APPLY

- 01 United Kingdom
- 02 Republic of Ireland
- 03 Other EU country
- 04 Other non-EU country

*IF qualifications at last interview > 0 [ff\_Qual = [0..9000] ]*

**FQMQUA\***

Since the last time that we interviewed [^you / [^name]] [^in date of last interview], [^have you / has [^name]] obtained any [^BLANK / further] qualifications?

- 01 Yes
- 02 No

*ELSE IF qualifications not given at last interview (DK, Ref, NA, New partner)  
[ff\_Qual = 9991 , 9998, 9999, empty]*

**FQAQUA\***  
**SHOWCARD L3**

[^Do you / Does [^name]] have any of the qualifications listed on this card? Please look down the whole list before telling me.

- 01 Yes
- 02 No

END OF FILTER

*IF (whether obtained any new qualifications = Yes) OR (whether has any qualifications listed on card AZ = Yes)*

*[FqMqua = 1 OR FqAQua = 1]*

**FQQUAL\***

SHOW CARD L3

Which of the qualifications on this card [^do [^you / [^name]] have / have [^you / [^name]] obtained since then]? Just tell me the number written beside each one.

INTERVIEWER: Record all that apply.

PROBE - 'Any others?'

- 01 Degree/degree level qualification (including higher degree)
- 02 Teaching qualification
- 03 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
- 04 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTECH Higher
- 05 ONC/OND/BEC/TEC/BTEC not higher
- 06 City and Guilds Full Technological Certificate
- 07 City and Guilds Advanced/Final Level
- 08 City and Guilds Craft/Ordinary Level

- 09 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

**[Code maximum 30 out of 30 possible responses]**

<b>Description</b>	<b>Archive</b>
Degree/degree level qualification (including higher degree)	FQQUADEG
Teaching qualification	FQQUATEA
Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife	FQQUANUR
HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTTECH Higher	FQQUAHNC
ONC/OND/BEC/TEC/BTEC not higher	FQQUAONC
City and Guilds Full Technological Certificate	FQQUACGF
City and Guilds Advanced/Final Level	FQQUACGA
City and Guilds Craft/Ordinary Level	FQQUACGO
A-levels/Higher School Certificate	FQQUAALE
AS Level	FQQUAASL
SLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies	FQQUASLC
O-level passes taken in 1975 or earlier	FQQUAOLP
O-level passes taken after 1975 GRADES A-C	FQQUAOLA
O-level passes taken after 1975 GRADES D-E	FQQUAOLD
GCSE GRADES A-C	FQQUAGCA
GCSE GRADES D-G	FQQUACD
CSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3	FQQUACS1
CSE GRADES 2-5/SCE Ordinary BANDS D-E	FQQUACS2
CSE Ungraded	FQQUACSU
SLC Lower	FQQUASLL
SUPE Lower or Ordinary	FQQUASUP
School Certificate or Matric	FQQUAMAT
NVQ Level 5	FQQUANV5
NVQ Level 4	FQQUANV4
NVQ Level 3/Advanced level GNVQ	FQQUANV3
NVQ Level 2/Intermediate level GNVQ	FQQUANV2
NVQ Level 1/Foundation level GNVQ	FQQUANV1
Recognised Trade Apprenticeship completed	FQQUATRA
Clerical or Commercial Qualification (eg typing/book-keeping/commerce)	FQQUACLE

*IF qualification = other [FqQual = 95]*

**FQQQ\***

What qualifications are these?

INTERVIEWER: Record all other qualifications in full.

PROBE - 'What else?'

String 60

*[Open responses to Fqoq are coded and merged with the multiple responses to Fqqal (recoded as above). These merged responses are recoded in variables: FQQUMDEG FQQUMTEA FQQUMNUR FQQUMHNC*

*FQQUMONCFQQUMCGF FQQUMCGA FQQUMCGO FQQUMALE FQQUMASL*

*FQQUMSLC FQQUMOLP FQQUMOLA FQQUMOLD FQQUMGCA FQQUGCD*

*FQQUMCS1 FQQUMCS2 FQQUMCSU FQQUMSLL FQQUMSUP FQQUMMAT*

*FQQUMNV5 FQQUMNV4 FQQUMNV3 FQQUMSNV2 FQQUMNV1 FQQUMMTRA*

*FQQUMCLE FQQUMFOR FQQUMNE FQQUMMIL FQQUMDIP FQQUMOAC*

*FQQUMOPR FQQUM85 FQQUM86]*

**FQQUAZM\* (FQQUAZ in Blaise FQUAM the backcoded one)**

SHOW CARD L3

Which of the qualifications on this card [^do [^you / [^name]] have / have [^you / [^name]] obtained since then]? Just tell me the number written beside each one.

INTERVIEWER: Record all that apply.

PROBE - 'Any others?'

01 Degree/degree level qualification (including higher degree)

02 Teaching qualification

03 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife

04 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTECH Higher

05 ONC/OND/BEC/TEC/BTEC not higher

06 City and Guilds Full Technological Certificate

07 City and Guilds Advanced/Final Level

08 City and Guilds Craft/Ordinary Level

09 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)
- 51 "Other - Qualifications outside the UK",
- 52 Other - Other vocational qualifications not otherwise codeable",
- 53 Other - NVQ level not specified",
- 54 Other - Nursery nurse examination board qualification",
- 55 Other - Qualification obtained during military service",
- 56 Other - Diploma",
- 57 Other - Other academic qualification not otherwise codeable",
- 58 Other - Other professional qualification not otherwise codeable",
- 85 Other answer - not codeable 01 to 29, 51 to 58, or 96",
- 86 Irrelevant response - not codeable 01 to 29, 51 to 58, or 96",
- 95 {Other qualifications}
- 96 None of these"), NODK, NORF, EMPTY

**[Code maximum 3 out of 40 possible responses]**

Description	Archive
Degree/degree level qualification (including higher degree)	FQQUMDEG
Teaching qualification	FQQUMTEA
Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife	FQQUMNUR
HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTECH Higher	FQQUMHNC
ONC/OND/BEC/TEC/BTEC not higher	FQQUMONC
City and Guilds Full Technological Certificate	FQQUMCGF
City and Guilds Advanced/Final Level	FQQUMCGA
City and Guilds Craft/Ordinary Level	FQQUMCGO
A-levels/Higher School Certificate	FQQUMALE
AS Level	FQQUMASL
SLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies	FQQUMSLC
O-level passes taken in 1975 or earlier	FQQUMOLP
O-level passes taken after 1975 GRADES A-C	FQQUMOLA
O-level passes taken after 1975 GRADES D-E	FQQUMOLD
GCSE GRADES A-C	FQQUMGCA
GCSE GRADES D-G	FQQUGCD
CSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3	FQQUMCS1
CSE GRADES 2-5/SCE Ordinary BANDS D-E	FQQUMCS2
CSE Ungraded	FQQUMCSU
SLC Lower	FQQUMSLL
SUPE Lower or Ordinary	FQQUMSUP
School Certificate or Matric	FQQUMMAT
NVQ Level 5	FQQUMNV5
NVQ Level 4	FQQUMNV4
NVQ Level 3/Advanced level GNVQ	FQQUMNV3
NVQ Level 2/Intermediate level GNVQ	FQQUMSNV2
NVQ Level 1/Foundation level GNVQ	FQQUMNV1
Recognised Trade Apprenticeship completed	FQQUMMTRA
Clerical or Commercial Qualification (e.g. typing/book-keeping/commerce)	FQQUMCLE
Other - Qualifications outside the UK	FQQUMOR
Other - Other vocational qualifications not otherwise codeable	FQQUMOVO
Other - NVQ level not specified	FQQUMNUZ
Other - Nursery nurse examination board qualification	FQQUMNNE



Other - Qualification obtained during military service	FQQUMOAC
Other - Diploma	FQQUMOPR
Other - Other academic qualification not otherwise codeable	FQQUM85
Other - Other professional qualification not otherwise codeable	FQQUM86

END OF FILTER

END OF FILTER

*IF age finished education not given at last interview (DK, REF, NA, New partner)  
[ff\_FqEnd = 9998, 9999, 9991, empty]*

**FQEND\* (consolidated variable FQENDM – which merges current and previous wave data –is archived under EUL)**

At what age did [*^you / ^name*] finish [*^your / his / her*] continuous full-time education at school or college?

- 01 Not yet finished
- 02 Never went to school
- 03 14 or under
- 04 At 15
- 05 At 16
- 06 At 17
- 07 At 18
- 08 19 or over

*[CHECK FQ3] SIGNAL: IF full-time education not yet finished*

*IF [FqEnd = 1]*

"INTERVIEWER: Please double check. - it should be impossible for respondents to still be in full time education and be in ELSA."

END OF FILTER

**CONTACT MODULE (CON)****Health visit agreement**

IF Core Member [CorePartner=1]

**FqNurse**

There are two parts to this survey. You have just helped us with the first part. We hope you will also help us with the second part, which is a visit by a qualified biomedical fieldworker to collect more medical information and carry out some measurements.

The the biomedical fieldworker will contact you to explain some more about what is required.

May I ask the biomedical fieldworker to contact you?

INTERVIEWER: If asked for details say - 'The biomedical fieldworker will take some measurement including your blood pressure. You will not have any measurements taken if you do not wish to.

- 1 Yes to health visit
- 2 No to health visit

*SOFT CHECK: IF CAVI ,Whether they agree or not to health visit, [IF CAVI=Yes AND IF (FqNurse 1 or 2)]*

*INTERVIEWER: You can send the health visit leaflet via email if they want more information about what it entails.*

IF No to health visit [FqNurse = 2]

**FqNurRf @**

INTERVIEWER: Record reason why respondent refused biomedical fieldworker contact.

- 0 Own doctor already has information
- 1 Given enough time already to this survey/expecting too much
- 2 Too busy, cannot spare the time (if Code 1 does not apply)
- 3 Had enough of medical tests/medical profession at present time
- 4 Worried about what biomedical field worker may find out/'might tempt fate'
- 5 Scared/of medical profession/particular medical procedures (eg blood sample)
- 6 Not interested/Can't be bothered/No particular reason
- 95 Other reason (specify)

*IF Other reason for refusing health visit [FqNurRf = 95]*

**FqNrRfO @**

INTERVIEWER: Please specify other reason for refusal.

STRING [60]

**The answers to FqNrRfO are backcoded, merged with answers to FqNurRf and archived as:**

Description	Variable	Archive
Own doctor already has information	FQNurRfm	fqnurrfod
Given enough time already to this survey/expecting too much	FqNurR17	fqnurrfex
Too busy cannot spare the time	FqNurR18	fqnurrfbu

Had enough of medical tests/medical profession at present time	FqNurR19	fqnurrfen
Worried about what biomedical field worker may find out/'might tempt fate'	FqNurR20	fqnurrfwo
Scared/of medical profession/particular medical procedures (eg blood sample)	FqNurR21	fqnurrfsc
Not interested/Can't be bothered/No particular reason	FqNurR22	fqnurrfno
Other answer- not codeable	FqNurR24	fqnurrf85
Irrelevant answer – not codeable	FqNurR25	fqnurrf86

END OF FILTER

END OF FILTER

*IF agreed to nurse visit [FqNurse = Yes]*

**FqApt @**

INTERVIEWER:

Explain to respondent that the biomedical fieldworker will try to call arrange an appointment.

Explain that the biomedical fieldworker will give details of how they can prepare for the health visit, including the fasting blood sample.

Press 1 and <Enter> to continue.

Range 1..1

END OF FILTER

END OF FILTER

## STABLE CONTACTS

*If no stable contact details in feed forward (NA, DK, Ref, new partner)*

*[IF (FF\_StName = 9991, 9998, 9999, EMPTY) AND (FF\_StAdd1 = 9991, 9998, 9999, EMPTY) AND (FF\_StAdd2 = 9991, 9998, 9999, EMPTY) AND (FF\_StAdd3 = 9991, 9998, 9999, EMPTY) AND (FF\_StAdd4 = 9991, 9998, 9999, EMPTY) AND (FF\_StPCode = 9991, 9998, 9999, EMPTY) AND (FF\_StTel = 9991, 9998, 9999, EMPTY)]*

**FqAddr\***

*[^Sometime in the next two years, we will wish to contact [^you / [^name]] again./BLANK]*

In case [^you / [^name]] move(s) 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 / [^name]] [^is/are]?

INTERVIEWER: IF THE RESPONDENT IS UNWILLING TO GIVE ADDRESS AS THEY ARE NOT PLANNING TO MOVE, ADD: 'AS PEOPLE WHO AREN'T PLANNING TO MOVE SOMETIMES DO MOVE BECAUSE THEIR CIRCUMSTANCES CHANGE, WE WOULD BE VERY GRATEFUL IF YOU COULD GIVE US THE NAME AND ADDRESS OF A CONTACT PERSON JUST IN CASE YOU DO MOVE UNEXPECTEDLY.'

IF THE RESPONDENT DOES NOT WANT TO GIVE STABLE CONTACT DETAILS BUT CAN BE CONTACTED AGAIN, PLEASE CODE 2."

1. Yes, respondent willing to give stable contact
2. No, respondent unwilling to give stable contact
3. SPONTANEOUS: RESPONDENT TO **PERMANENTLY** WITHDRAW FROM ELSA: Does not wish to recontacted

IF Fqaddr=3

**Fqaddrwhy**

Is there a specific reason why you want to withdraw from ELSA?

string [100]

END OF FILTER

END OF FILTER

*IF Stable contact previously given [IF FFIV[PNumHH].FF\_StName <> "]*

**FqStC\***

Sometime in next two years, we will wish to contact [**^you / ^name**] again. Last time we interviewed [**^you / ^name**], [**^you/he/she**] gave us the address and telephone number of a relative or close friend we could contact to find out where [**^you/he/she**] [**^is/are**] if [**^you/he/she**] move(s) from this address. Can I check that these details are still correct?

INTERVIEWER: CHECK NAME, ADDRESS AND TELEPHONE NUMBER OF STABLE CONTACT:

Name: [**^FF\_StName**] Relationship: [**^FF\_StRel**]

Address :[**^ FF\_StAdd1**

[**^FF\_StAdd2**

[**^FF\_StAdd3**

[**^FF\_StAdd4**

Postcode:[**^ FF\_StPCode**]

Telephone:[**^ FF\_StTel**]

Please do not enter details of people living in the same household as the respondent. Ask for details of someone living elsewhere instead.

- 1 Stable contact details correct
- 2 Stable contact details not correct and need to make an amendment
- 3 Wishes to give a different stable contact
- 4 SPONTANEOUS: Respondent to **permanently withdraw** from ELSA: Does not wish to be recontacted

IF FqStc=4

**FqStcwhy**

Is there a specific reason why you want to withdraw from ELSA?

string [100]

END OF FILTER

**[CHECK CON1] SIGNAL: IF Permanently withdraws from ELSA [FQstc= 4]**

INTERVIEWER: PLEASE CHECK YOUR CODING. Are you sure that [**^You/name**] should

be **PERMANENTLY** removed from the issued ELSA sample and not be invited to take part again at the next wave?

If the respondent does not want to give stable contact details but can be contacted again, please code 2.

**[CHECK CON2] SIGNAL: IF permanently withdraws from ELSA [FQStC = 4]**

INTERVIEWER: PLEASE CHECK YOUR CODING. Are you sure that [^You/name] should be **PERMANENTLY** removed from the issued ELSA sample and not be invited to take part again at the next wave?

If the respondent no longer wants this person to be their stable contact and does not have anyone else to nominate, code (3) and enter <Ctrl + R> (Refused) in ALL the stable contact name and address questions. If the respondent no longer wants this person to be their stable contact and has someone else to nominate, code 3 and enter the new details

IF IndOutC IN [c21,c23,c31..c78,c92]

**StSam**

INTERVIEWER: Do you want to make a change to the stable contact details for [^Name]?

INTERVIEWER: Current details of stable contact are:

Name: [^FF\_StName]

Relationship: [^FF\_StRel]

Address :[^FF\_StAdd1]

[^FF\_StAdd2]

[^FF\_StAdd3]

[^FF\_StAdd4]

Postcode: [^FF\_StPCode]

Telephone: [^FF\_StTel]

Person [^Person number]"

1. Yes

2. No

NO DK, NO REF

END OF FILTER

*IF Respondent wants to make a change to the stable contact details. IF StSam=1.*

**StNam**

INTERVIEWER: Person [^Person number] - stable contact details.

Person [^Person number] : [^Name]

Please enter the full name of the stable contact person including TITLE, NAME and SURNAME

String [50]

*HARD CHECK: IF the first character of STNam is numeric.*

*INTERVIEWER: Please check. Are you sure you entered the person's name? Stable contact name cannot begin with a number.*

*SOFT CHECK: IF Stable contact's name only contains title. IF StNam = ONLY "Mr" OR "Mrs" or "Miss" or "Ms" or "Dr" or "Prof"*

*INTERVIEWER: Please enter the stable contact's first name.*

**StRel**

"INTERVIEWER: Person [^Person number] - stable contact details.

Person [^Person number] : [^Name]

Please enter relationship of contact person to person [^Person number]."

String [40]

**StAdA**

INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter contact address.

String [30]

*HARD CHECK: IF first character of StAdA is "0".*

*INTERVIEWER: Please check. Are you sure you entered the first line of the address?*

*SOFT CHECK: If StAda contains the following words "Same" or "above" or "before" or "previous" or "address".*

*INTERVIEWER: Please enter the address in full.*

*CHECK: If STADa contains the words "Unknown" or "not known".*

*INTERVIEWER: "if the address is not known please enter <CTRL+ K>*

**StAdB**

"INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter contact address.

(Just press <Enter> if no more to add.)

String [30] , EMPTY, NODK, NORF

*CHECK: IF first character of STAdB is "0".*

*INTERVIEWER: Please check. Are you sure you entered the second line of the address?*

*CHECK: IF StadB= StadA*

*INTERVIEWER: Duplicate information please review.*

**StAdC**

INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter contact address.

(Just press <Enter> If no more to add.)"

String [30], EMPTY, NODK, NORF

**StAdD**

INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter contact address.

(Just press <Enter> If no more to add.)"

String [30], EMPTY, NODK, NORF

**StAdF**

"INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter contact address.

Postcode:

(Just press <Enter> if none.)"

String [10], EMPTY, NODK, NORF

**StTel**

"INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter telephone number.  
 Telephone Number  
 Include standard code.  
 IF (not obtained, enter <Ctrl K>"  
 String [15]

If Stel= Response

**StTelB**

"INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter second telephone number if available.

Telephone Number

Include standard code.

IF (not obtained, enter <Ctrl K>"

String [15]

END OF FILTER

*CHECK: IF StTelB= StTELa*

*INTERVIEWER: Duplicate information please review.*

END OF FILTER

end of filter

**ConDet**

"INTERVIEWER: Person [^Person number] : [^Name]

Contact person Name : [^StNam|Relationship] : [^Strel]

Address : [^StAda]

[^stadb]

[^stadc]

[^stadd]

PC : [^stadf]

Telephone: [^StTel]

Is this correct? Go back and change if not correct.

[INTERVIEWER: Please give the respondent a copy of the nominated contact leaflet to give to the person whose details they have just given you./IF CAVI: INTERVIEWER: PLEASE TELL THE RESPONDENT THAT A NOMINATED CONTACT LEAFLET WILL BE POSTED TO THE RESPONDENT TO GIVE TO THE STABLE CONTACT]

1. Correct

2. **Not** correct

NODK, NORF

*IF face to face interview*

*[IF VAPI<>1]*

**StLeafl**

HAS THE STABLE CONTACT RECEIVED (from you) / WILL THEY RECEIVE THE LEAFLET 'Information for Nominated Contacts'?"

1Yes

2 No

END OF FILTER

IF FF\_Pname<>Empty

**FqProxB\***

"Last time we interviewed [^you / [^name]], [^you/he/she] gave us the details of a relative or close friend we could approach to collect information about [^your/his/her] circumstances if

we were unable to contact [^you/him/her] personally when we next visited. This could be if [^you/he/she] [^were/was] ill at the time, or had moved into a residential or nursing home and [^were/was] unable to speak to us. Can I check that the contact details for this person are correct?

Name: [^FF\_PNName] |Relationship]: [^FF\_PNRel]

Address: [^FF\_PNAdd1]

[^FF\_PNAdd2]

[^FF\_PNAdd3]

[^FF\_PNAdd4]

Postcode:[^FF\_PNPCode]

Telephone:[^FF\_PNTel]"

- 1 Contact address details correct
- 2 Contact details not correct and need to make an amendment
- 3 Wishes to give a different proxy/ consultee nomination
- 4 SPONTANEOUS: Does not wish to be interviewed by proxy/ consultee

END OF FILTER

IF FF\_Pname= Empty

**FqProx\***

"We will wish to contact [^you/ [^name]] again in the future. If we are unable to contact [^you/him/her] personally when we next visit, for example if [^you/he/she] [^were/was] ill at the time, would [^you/he/she] be prepared for us to collect information about [^your/his/her] circumstances from [^spouse a relative or a close friend]?"

INTERVIEWER: If asked please clarify further: 'For example, we would not intentionally approach someone if [^you/he/she] [^were/was] away on holiday or temporarily ill. We would only approach the person if [^you/he/she] [^were/was] too sick, either physically or mentally, or if [^you/he/she] had died. We would not give the person details of what [^you/he/she] [^have/has] said in previous interviews.'"

- 1 Willing to give proxy/ consultee nomination
- 2 Unwilling to give proxy/ consultee nomination
- 3 SPONTANEOUS: Does not wish to be interviewed by proxy/ consultee

END OF FILTER

**Note for programmer: If FqProx =2 or 3 Please leave Proxy name details blank as at the moment it seems they are automatically getting populated with "NO PROXY: DOES NOT WISH PROXY/CONSULTEE INTERVIEW"**

**PrDisp\***

"The proxy/ consultee nomination details for [^Name] are:

Name: [^FF\_PNName|Relationship]: [^FF\_PNRel]

Address :[^ FF\_PNAdd1]

[^FF\_PNAdd2]

[^FF\_PNAdd3]

[^FF\_PNAdd4]

Postcode: [^FF\_PNPCode]

Telephone: [^FF\_PNTel]

Are these correct?"

- 1 Yes,
- 2 No - I need to make an amendment to the proxy/ consultee details



IF willing to give proxy/consultee nomination OR needs to make an amendment to proxy details {FqProx=1 OR FqProxb=2}

**FqPrW1**

"Who would be the best person for us to approach?"

per1 [^dmname[1]]

per2 [^dmname[2]]

per3 [^dmname[3]]

per4 [^dmname[4]]

per5 [^dmname[5]]

per6 [^dmname[6]]

per7 [^dmname[7]]

per8 [^dmname[8]]

per9 [^dmname[9]]

per10 [^dmname[10]]

per11 [^dmname[11]]

per12 [^dmname[12]]

per13 [^dmname[13]]

per14 [^dmname[14]]

per15 [^dmname[15]]

per16 [^dmname[16]]

StableC(96) [^THHP96Txt]

NotHh (97) "Not a household member"

*Note for programmer: If FqPrW1 = 1 to 16 please do not add person no. of respondent in HH to Proxy name as is happening at the moment (it says e.g. "(Pno 2)")*

END OF FILTER

IF if proxy is not HH member OR fed forward proxy details need amending OR fed forward proxy details incorrect [(FqPrW1 = 97 Nothh) OR (FqProxB = NCorr) OR (PrDisp = No)]

**PNNam**

"INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter the title and FULL NAME of proxy/ consultee nomination including TITLE, NAME AND SURNAME."

String [50]

*HARD CHECK: IF first character of PNNam is numeric.*

*INTERVIEWER: Please check. Are you sure you entered the person's name? Name should not begin with a number.*

*SOFT CHECK: IF proxy/consultee's name only contain title. IF Pnam = ONLY "Mr" OR "Mrs" or "Miss" or "Ms" or "Dr" or "Prof"*

*INTERVIEWER: Please enter the proxy/consultee's first name.*

*SOFT CHECK: If Proxy/consultee name contains the following words: "Husband" or "wife" or "partner" or "son" or "daughter" or "friend" or "neighbour" or "mother" or "father".*

*INTERVIEWER: It looks like you have entered the relationship to the respondent. Please review you coding and insert relationship at PNRel.*

**PNRel**

"INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter relationship of proxy/ consultee nomination person to person [^Person number]."

String [40]

*Note to programmer: IF proxy/consultee nomination is someone in the household. (IF FqPrW1=1 to 16). Compute PNAda from Respdn's address.*

*IF proxy consultee nomination is NOT someone in the household (IF FqprW1=97)*

#### **PNAdA**

INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter proxy/ consultee nomination address.

String [30]

*CHECK: IF first character of PNAda begins is "0".*

*INTERVIEWER: Please check. Are you sure you entered the first line of the address?*

*SOFTCHECK: If PNAda contains the following words "Same" or "above" or "before" or "previous" or "address".*

*INTERVIEWER: Please enter the address in full.*

*CHECK: If PnAda contains the words "Unknown" or "not known".*

*INTERVIEWER: "if the address is not known please enter <CTRL+k>*

#### **PNAdB**

INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter proxy/ consultee nomination address.

(Just press <Enter> IF (no more to add.)"

String [30], EMPTY, NODK, NORF

*CHECK: IF first character of PNAdB is "0".*

*INTERVIEWER: Please check. Are you sure you entered the second line of the address?*

*CHECK: IF PNAdB=PnADA*

*INTERVIEWER: "Duplicate information, please review*

#### **PNAdC**

INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter proxy/ consultee nomination address.

(Just press <Enter> IF (no more to add.)

String [30], EMPTY, NODK, NORF

#### **PNAdD**

INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter proxy/ consultee nomination address.

(Just press <Enter> IF (no more to add.)"

String 30, EMPTY, NODK, NORF

#### **PNAdF**

INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter proxy/ consultee nomination address.

Postcode:

(Just press <Enter> IF (none.)"

String 10, EMPTY, NODK, NORF

END OF FILTER

### **PNTel**

INTERVIEWER: Person [^Person number] - proxy/ consultee nomination address.

Person [^Person number] : [^Name]

Please enter proxy/ consultee nomination telephone number.

Telephone Number:

Include standard code.

IF (not obtained, enter <Ctrl K>"

String [15]

IF PnTel=response

### **PNTelB**

"INTERVIEWER: Person [^Person number] - contact address.

Person [^Person number] : [^Name]

Please enter proxy/consultee second telephone number if available.

Telephone Number

Include standard code.

IF (not obtained, enter <Ctrl K>"

String [15]

END OF FILTER

### **ConDetN**

INTERVIEWER: Person [^Person number]: [^Name]

Contact person Name : [^PNNam]

Relationship : [^PNRel]

Address : [^PNAda] [^PNadb] [^PNadc] [^PNadd]

PC: [^PNadf]

Telephone: [^PNTel]

Is this correct? Go back and change if not correct.

[^INTERVIEWER: Please give the respondent a copy of the nominated contact leaflet to give to the person whose details they have just given you"(unless the named proxy is an ELSA respondent or you have already given the respondent a leaflet for this person/BLANK

1. Correct

2 **Not** correct

NODK, NORF

### **PrLeafl**

INTERVIEWER: PLEASE:

1) ASK THE RESPONDENT TO TELL THE NOMINATED PROXY THAT THEIR DETAILS HAVE BEEN PASSED TO ELSA AND WHY.

2) "IF VAPI<>1 "IF POSSIBLE HAND OVER THE 'Information for Nominated Contacts' LEAFLET TO BE PASSED ON TO THE PROXY NOMINEE."; IF VAPI=1 "INTERVIEWER: PLEASE TELL THE RESPONDENT THAT A NOMINATED CONTACT LEAFLET WILL BE POSTED TO THE RESPONDENT TO GIVE TO THE CONTACT"}

HAS THE NOMINATED PROXY RECEIVED (from you) / WILL THEY RECEIVE THE LEAFLET 'Information for Nominated Contacts'?"

1. Yes

2. No

**PrAdCorr**

Under current data protection legislation, in order to hold this information, we need to tell your nominated contact that we hold their personal details, and tell them how they can get in touch with us if they have any questions or wish us to delete their information. For this reason, we are legally required to post them this information leaflet. Could I please check if you have any further address details for them to enable us to do so?

INTERVIEWER: IF MORE DETAILS AVAILABLE, I PLEASE GO BACKI TO FILL IN THE INFORMATION

INTERVIEWER: IF ASKED: We will not be able to retain the nominated contact details you have provided unless we complete this legally required step."

Press <1> and <Enter> to continue

NODK, NORF

END OF FILTER

**CONSENTS**

*If consented to HES at previous wave=Yes*

*[FF\_HESConsent = 1]*

**ConHESC**

Our records show that you have kindly given us permission to obtain information from administrative records held by NHS Digital (now called NHS England), the national controllers of health data.

INTERVIEWER: PRESS <F9> FOR A DESCRIPTION OF NHS DIGITAL (FORMERLY THE HEALTH AND SOCIAL CARE INFORMATION CENTRE).

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

INTERVIEWER: IF RESPONDENT CONTESTS HAVING PREVIOUSLY AGREED TO PARTICIPATE AND IS UNHAPPY TO DO SO, CODE AS (2) Withdraw agreement to participate."

F9 Text: Administrative data about health service use is now held by NHS England (previously NHS Digital), the national controllers of health data. Prior to Wave 9 respondents agreed to linkage with data held by the Health and Social Care Information Centre, and prior to Wave 8 to data held by the NHS. The data being linked to has not changed, just the name of the organisation who manage the data."

F9 Text: "HES agreement to participate (Agreement to participate A) confirmation"

1 Agreement to participate still given

2 Respondent asked to withdraw hospital records agreement to participate

NODK, NORF

END OF FILTER

*If refused HES consent at previous wave or not in feed-forward data (2, NA, DK, Ref, new partner) [IF FF\_HESConsent = 2, 9991, 9998, 9999, empty]*

**ConHES**

SHOW CARD M1

We have asked about many aspects of your health. To make this information complete we would like to collect information from administrative records held by NHS England, the

national controllers of health data. Like the answers you have given us, the information collected from these records will be completely confidential in accordance with current data protection legislation. This card explains in more detail and you can ask me any questions that you may have.

INTERVIEWER: PRESS <F9> FOR A DESCRIPTION OF NHS England (FORMERLY NHS Digital).  
YOU CAN ALSO USE THE AGREEMENT TO PARTICIPATE FLOWCHART ON SHOWCARD M2

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

INTERVIEWER: GIVE THE RESPONDENT THE TIME TO READ IT AND THEN ASK:  
Do you give permission for your name, address, sex, date of birth and NHS Number to be passed to NHS England so your health and treatment information held on the Hospital Episodes database can be identified and sent to the ELSA research team to be added to your study information, and used for research purposes only?

F9 Text: "Administrative data about health service use is now held by NHS England (previously NHS digital), the national controllers of health data. Prior to Wave 9 respondents agreed to linkage with data held by the Health and Social Care Information Centre, and prior to Wave 8 to data held by the NHS. The data being linked to has not changed, just the name of the organisation who manage the data."

1. Hospital records agreement to participate given
  2. Hospital records agreement to participate refused
- NODK, NORF

END OF FILTER

*If consented to ConPCC at previous wave=Yes*

*[FF\_PCConsent= 1]*

**ConPCC**

"Our records show that you have kindly given us permission to obtain information | from primary care records.

INTERVIEWER: PRESS <F9> for details of what information will be linked from primary care records.

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

INTERVIEWER: IF RESPONDENT CONTESTS HAVING PREVIOUSLY AGREED TO PARTICIPATE AND IS UNHAPPY TO DO SO, CODE AS (2) 'Withdraw agreement to participate '."

Text for F9:

"The primary care data will cover:

- Dates of doctor and nurse consultations,
- Diagnoses received,
- Treatments given,
- Referrals made.

This information will be used for research purposes only."

1. Agreement to participate still given
  2. Respondent asked to withdraw primary care agreement to participate
- NODK, NORF

**END FILTER**

*If refused ConPCC consent at previous wave or not in feed-forward data (2, NA, DK, Ref, new partner)*

*[IF FF\_PCConsent = 2, 9991, 9998, 9999, empty]*

**ConPC**

" SHOW CARD M1

In order to make our information about your health complete, we would also like to find out more from primary care records. The information from these records will be completely confidential in accordance with current data protection legislation. This card explains in more detail and you can ask me any questions that you may have.

INTERVIEWER: PRESS <F9> FOR DETAILS OF WHAT INFORMATION WILL BE LINKED FROM PRIMARY CARE RECORDS.

YOU CAN ALSO USE THE AGREEMENT TO PARTICIPATE FLOWCHART ON SHOWCARD M2

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

F9 Text: "INTERVIEWER: GIVE THE RESPONDENT THE TIME TO READ IT AND THEN | ASK: Do you give permission for your name, address, sex, and date of birth and NHS | Number to be passed to NHS England so information about your health and treatment held in | primary care records can be identified and sent to the ELSA research team to be added to | your study information, and used for research purposes only?"

"The primary care data will cover:

Dates of doctor and nurse consultations,  
Diagnoses received,  
Treatments given,  
Referrals made.

This information will be used for research purposes only."

1. Primary care agreement to participate given
2. Primary care agreement to participate refused")

NODK, NORF

**END OF FILTER**

*If consented to ConCMC at previous wave=Yes*

*[FF\_NHSConsent = 1]*

**ConCMC**

"Our records show that you have kindly given us permission to obtain information | on important diseases and causes of death from the NHS England central register.

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

INTERVIEWER: PRESS <F9> FOR DESCRIPTION OF NHS DIGITAL (FORMERLY THE HEALTH AND SOCIAL CARE INFORMATION CENTRE) INTERVIEWER: IF RESPONDENT CONTESTS HAVING PREVIOUSLY AGREED TO PARTICIPATE AND IS UNHAPPY TO DO SO, CODE AS (2)

'Withdraw agreement to participate'."

F9 Text: "Administrative data about health service use is now held by NHS England

(previously NHS Digital), the national controllers of health data. Prior to Wave 9 respondents agreed to linkage with data held by the Health and Social Care Information Centre. Prior to Wave 6 respondents agreed to linkage with data held by the NHS or Department of Health. The data being linked to has not changed, just the name of the organisation who manage the data."

1. Agreement to participate still given
2. Respondent asked to withdraw cancer and death records agreement to participate

NODK, NORF

*END OF FILTER*

*If refused once Concmc consent at previous wave or not in feed-forward data (2, NA, DK, RefOnce, new partner)*

*[IF FF\_ NHSConsent = Refonce, 9991, 9998, 9999, empty]*

**ConCM**

" SHOW CARD M1

NHS Digital, the national controller for health data, has a central register which records information on important diseases and causes of death. This card explains in more detail and you can ask me any questions that you may have.

INTERVIEWER: PRESS <F9> FOR DESCRIPTION OF NHS DIGITAL (FORMERLY THE HEALTH AND SOCIAL CARE INFORMATION CENTRE)

YOU CAN ALSO USE THE AGREEMENT TO PARTICIPATE FLOWCHART ON SHOWCARD M2

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

"INTERVIEWER: GIVE THE RESPONDENT THE TIME TO READ IT AND THEN ASK: Do you give permission for your name, address, sex, and date of birth and NHS Number to be passed to NHS England so your NHS health records on this register can be identified and sent to the ELSA research team to be added to your study information, and used for research purposes only?"

F9 Text: "Administrative data about health service use is now held by NHS Digital, the national controllers of health data. Prior to Wave 9 respondents agreed to linkage with data held by the Health and Social Care Information Centre. Prior to Wave 6 respondents agreed to linkage with data held by the NHS or Department of Health. The data being linked to has not changed, just the name of the organisation who manage the data."

1. Cancer and death records agreement to participate given
2. Cancer and death records agreement to participate refused" )

NODK, NORF

*End of filter*

*If consented to EcoC at previous wave=Yes*

*[FF\_econConsent= 1]*

**ConEcoC**



| Our records show that you have kindly given us permission to obtain information | from administrative records held by His Majesty's Revenue and Customs and the | Department for Work and Pensions.

SHOW CARD M3 AND SHOW CARD M4 EXPLAIN THE PROCESS IN MORE DETAIL.

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

INTERVIEWER: IF RESPONDENT CONTESTS HAVING PREVIOUSLY AGREED TO PARTICIPATE AND IS UNHAPPY TO DO SO, CODE AS (2)

1. Agreement to participate still given "
  2. Respondent asked to withdraw economic agreement to participate"),
- NODK, NORF

END OF FILTER

*If refused ConEco consent at previous wave or not in feed-forward data (2, NA, DK, Ref, new partner)*

*[IF FF\_EcoConsent = 2, 9991, 9998, 9999, empty]*

**ConEco**

" SHOW CARD M3

In order to make our information about your economic circumstances complete, we would like to find out more from administrative records held by His Majesty's Revenue and Customs and the Department for Work and Pensions. The information from these records will be completely confidential in accordance with current data protection legislation. This card explains in more detail and you can ask me any questions that you may have.

YOU CAN ALSO USE THE AGREEMENT TO PARTICIPATE FLOWCHART ON SHOWCARD M4

INTERVIEWER: THE ELSA PRIVACY NOTICE CAN BE FOUND: [natcen.ac.uk/elsa-privacy-notice](http://natcen.ac.uk/elsa-privacy-notice)

INTERVIEWER: GIVE THE RESPONDENT THE TIME TO READ IT AND THEN ASK:  
Do you give permission for your name, address, sex, date of birth and National Insurance number to be passed to the DWP, HMRC or a secure part of ONS that carries out data linkage so your economic records can be linked to your study information and used for research purposes only?

- 1 Economic agreement to participate given
  - 2 Economic agreement to participate refused
- NODK, NORF

*IF CONEco=1*

**NINO**

Would you be willing to give me your National Insurance number so that we could send this to the Department for Work and Pensions and Her Majesties Revenue and Customs to help identify your records accurately?

1. Yes
2. No

[NO DK/REF]

*If agree to give national insurance number [NINO=1]*

**WHNINI**



INTERVIEWER: THE NI NUMBER SHOULD BE IN THE FOLLOWING FORMAT:  
 AB121212A  
 THERE SHOULD BE NO SPACES  
 String [9]

**[CHECK CON3] CHECK:** IF Length of National Insurance Number is less than 9 characters [IF LEN (WHNINI) < 9]  
 INTERVIEWER: THERE ARE TOO FEW CHARACTERS. PLEASE CHECK AND AMEND.

**[CHECK CON4] CHECK:** IF National Insurance Number (WHNINI) does not start or end with a letter  
 INTERVIEWER: ALL NI NUMBERS START AND END IN LETTERS, PLEASE CHECK AND AMEND.

END OF FILTER  
 END OF FILTER  
 END OF FILTER

## PERSONAL CONTACT DETAILS

*IF respondent is ELSA core member or partner [ff-corepartne=1 or 0]*

**Titl**  
 INTERVIEWER: Check/collect respondent's title, first name and surname. If surname is missing please ask respondent to provide it  
 Title: [^ FF\_Title]  
 First name: [^FF\_Name]  
 Surname: [^FF\_Surnam]  
 Confirming respondent details  
 1 Correct  
 2 Incorrect  
 END OF FILTER

### NTNp

INTERVIEWER: This is a new ELSA respondent, please press <1> and <Enter> to record or confirm their details."

"New partner"

<1>

NODK,

NORF

### NT

INTERVIEWER: Person ^Person number - please enter the title.

Person ^Person number : ^Name

Title:

String [10]

### NF

INTERVIEWER: Person ^Person number - please enter the first name.

Person ^Person number : ^Name

First name:

String [20]

### NS

INTERVIEWER: Person ^Person number - please enter the surname.

Person ^Person number : ^Name

Surname:

String [20]

## INSTITUTIONS DETAILS

### InstDetC

"We have [^you / [^name]] recorded as living in an institution. Are the following institution details correct?"

Institution name: [^FF\_Instname]

Institution contact person: [^FF\_Instcontact]

Institution Address Line 1: [^FF\_InstAdd1]

Institution Address Line 2: [^FF\_InstAdd2]

Institution Address Line 3: [^FF\_InstAdd3]

Institution Address Line 4: [^FF\_Instadd4]

Institution Postcode: [^InstAddPC]

Institution Telephone Number: [^FF\_InstTel]"

1. Yes details are correct
2. No, I need to make an amendment to the details

*IF institution detail not correct [Instdet=2]*

#### InstName

"Please enter Institution Name"

String [100]

#### InstCont

"Please enter Contact Person at institution"

String [100]

#### InstAdd1

"Please enter Institution Address Line 1"

String [100]

#### InstAdd2

"Please enter Institution Address Line 2"

String [100]

#### InstAdd3

"Please enter Institution Address Line 3"

String [100]

#### InstAdd4

"Please enter Institution Address Line 4"

String [100]

#### InstAdPC

"Please enter Institution Postcode"

String [30]

#### InstTel

"Please enter Institution Telephone number"

String [15]

END OF FILTER

## PERSONAL CONTACT DETAILS

### TelChk

"INTERVIEWER: Check all telephone numbers available for [^Name] including both landline and mobile numbers.

Telephone numbers:

Telephone number 1: [^FF\_Tel1]

Telephone number2: [^FF\_Tel2]

Telephone number3: [^FF\_Tel3]"

1. Correct - no amendments or additional numbers
2. Incorrect - need to add or amend telephone numbers

### Tel1

"INTERVIEWER: PLEASE RECORD/CORRECT THE FIRST TELEPHONE NUMBER (LANDLINE OR MOBILE) FOR THE RESPONDENT HERE. YOU CAN COLLECT UP TO THREE TELEPHONE NUMBERS.

INTERVIEWER: IF NO TELEPHONE NUMBER AVAILABLE, ENTER <CTRL> + K. IF NOT WILLING TO GIVE A NUMBER ENTER <CTRL> + R."

String [15]

### Tel2

"INTERVIEWER: PLEASE RECORD/CORRECT THE SECOND TELEPHONE NUMBER (LANDLINE OR MOBILE) FOR THE RESPONDENT. INTERVIEWER: IF NO SECOND NUMBER AVAILABLE, ENTER <CTRL> + K. IF NOT WILLING TO GIVE A NUMBER ENTER <CTRL> + R."

String [15]

### Tel3

"INTERVIEWER: PLEASE RECORD/CORRECT THE THIRD TELEPHONE NUMBER (LANDLINE OR MOBILE) FOR THE RESPONDENT. INTERVIEWER: IF NO THIRD TELEPHONE NUMBER AVAILABLE ENTER <CTRL> + K. IF NOT WILLING TO GIVE A NUMBER ENTER <CTRL> + R."

String [15]

### EmailChk

"Thank you for providing us with an email address. We may use it from time to time to keep in touch about ELSA research. In the future it may also be possible to complete your ELSA interview online, and to do this we would need your email address to send you a unique link to the survey. Is/are you email address(es) still:

Email address 1: [^FF\_EMailAd1]

Email address 2: [^FF\_emailAd2]

INTERVIEWER: IF NO LONGER HAPPY FOR US TO HOLD EMAIL ADDRESS FOR THE PURPOSES MENTIONED, CODE (2) 'Incorrect' AND IN THE NEXT QUESTION DELETE THE EMAIL ADDRESS AND ENTER <CTRL> + R."

1. Correct - no amendments or additional email addresses
2. Incorrect (2) "Incorrect - need to add or amend email addresses

### Futmail

"We would like to use email from time to time to keep in touch about ELSA research. In the future it may also be possible to complete the ELSA interview online, and to do this we

would need an email address to send a unique link to the survey. Do you have an e-mail address [^LFutMail]

INTERVIEWER: IF HESITANT/QUERIES: The e-mail address would only be used for research purposes and would not be passed on to anyone outside NatCen."

- 1 Yes
- 2 No, have not got email
- 3 Do not wish to give email address

*IF has email address [Futmail=1]*

**EmailAd1**

"What is your (first) e-mail address?"

INTERVIEWER: YOU CAN COLLECT UP TO TWO EMAIL ADDRESSES. ENTER THE FIRST ONE HERE."

/"Respondent first email address"

String [60]

**Email1Chk**

"INTERVIEWER: PLEASE RE-ENTER THE FIRST EMAIL YOU HAVE JUST TYPED IN."

String [60]

**EmailAd2**

"Do you have another email address we could contact you on?"

INTERVIEWER: IF NO SECOND EMAIL ADDRESS AVAILABLE, ENTER <CTRL> + K. IF NOT WILLING TO GIVE AN EMAIL ADDRESS ENTER <CTRL> + R."

String [60]

**Email2Chk**

"INTERVIEWER: PLEASE RE-ENTER THE SECOND EMAIL YOU HAVE JUST TYPED IN."

String [60]

END OF FILTER

## INCENTIVE REMINDER

*IF interview conducted by a proxy informant irrespective of the incentive type (Incenttype= unconditional OR Incenttype= conditional)*

**VouchProx**

As a thank you for taking the time to answer questions on behalf of [^Name], we would like to offer you a £20 voucher.

1. Respondent wants physical gift card (IF lssmode=1 [^INTERVIEWER – Inform the proxy informant it will be given at the end of the interview]; IF lssmode=2 (CAVI) [^INTERVIEWER – Inform the respondent that the the git card will be sent in a few weeks by post])
- 2 . Respondent wants to donate their incentive to a charity

SOFT CHECK IF VouchProx=1: Please make sure that the nominated proxy contact details are correct/updated

*IF VouchProx=2 (wants to donate incentive to a charity)*

**VouchCharPx**

INTERVIEWER: Ask proxy to choose one of the following charities

```

| | 1. Age UK
| | 2. British Heart foundation
| | 3. Action for Children
| | END OF FILTER
| | END OF FILTER
| | END OF FILTER

```

*IF incentype<> unconditional*

**EVouchP**

As a thank you for your time, we would like to offer you a £20 voucher. Would you prefer an e-voucher or a physical gift card?

INTERVIEWER: Please check that they're happy to receive the voucher at the email address below. If they want it sent to a different email address or there is no email address below, code 2:

<display primary email address on record; if none "RESPONDENT HAS NOT PROVIDED AN EMAIL ADDRESS">

INTERVIEWER: Email vouchers will arrive in next few weeks. They can call Love2Shop or visit their website for more information about the voucher.

1. Email voucher to address above
2. Email voucher to different (or new) email address
3. Respondent wants gift card instead
4. Respondent wants to donate their incentive to a charity

[CHECK INC1] SIGNAL: IF interview by CAVI and respondent wants a physical gift card [EVouchP = 3 and IssMode=2] INTERVIEWER: Respondent will be sent a gift card by post

*IF respondent wants a physical gift card and interview is face to face [EVouchP=3 and IssMode<>2]*

**EvouchGC**

Please inform the respondent that there are still a few questions to go and that they will receive their voucher at the end of the interview

Press 1 and <enter> to continue.

END OF FILTER

*IF EVouchP = 2*

**Voucem**

"INTERVIEWER: Please enter email address they want the voucher sent to"

: STRING[60]

[No DK or Ref]

END OF FILTER

*IF EVouchP = 1 AND No email address given*

**Vouchec**

"INTERVIEWER: PLEASE RE-ENTER THE EMAIL YOU HAVE JUST TYPED IN."

/"Check question to validate first email address entry"

: STRING[60]

**[CHECK INC2] CHECK:** IF (Voucem = RESPONSE) THEN

EmailCheck(Voucem,Voucem)

Vouchec

CHECK

(Voucem = Vouchec)

INTERVIEWER: The two entries do not match! Please check for typos, or turn the screen to the respondent so that they can check the spelling.

END OF FILTER

*IF EvocuhP= 4 (wants to donate incentive to a charity)*

**VouchChar**

INTERVIEWER: Ask respondent to choose one of the following charities

1. Age UK
2. British Heart foundation
3. Action for Children

END OF FILTER

END OF FILTER

*IF Incenttype= unconditional*

**EvouchX**

INTERVIEWER: The respondent already received an unconditional £20 incentive with the advance letter. Please do not issue another incentive. Please however remind them that the incentive will expire after **6 months** from when it was received. An expiration date is on the card.

If respondent says that they have not received the gift card, please ask them to check the envelope in which they have received their advance materials. A replacement incentive will be posted from the NatCen office a few weeks after interview if you select code 2 below.

- 1 Continue
- 2 SPONTANEOUS – Respondent did not receive voucher

END OF FILTER

## FUTURE ADDRESS

### **NewAdd**

"INTERVIEWER: Did the respondent(s) tell you that they were planning to move from this address?"

1. Yes - respondent given new address
2. Yes - but respondent has not got a new address yet
3. No

### **NAdd1**

"INTERVIEWER: What is the new address?"

First line..."

String [30]

NODK, NORF

### **NAdd2**

"Second line..."

String [30]

NODK, NORF, EMPTY

**NAdd3**

"Third line...

(Just press <Enter> IF (no more to add.)"

String [30]

EMPTY, NODK, NORF

**NAdd4**

"Fourth line...

(Just press <Enter> IF (no more to add.)"

String [30]

EMPTY, NODK, NORF

**NAddPc**

"Postcode..."

String [10], DK

**NTel**

"INTERVIEWER: Enter telephone number of the new address. Include standard code. If not obtained, enter <Ctrl K>."

String [15]

**NewDat**

"INTERVIEWER: Please enter date moving to this address."

/"Date moving to new address"

: DATETYPE

*[CHECK CON5] CHECK: IF Date moving to future address is before the date of the interview*

*IF [NewDat < PSIntDat]*

*INTERVIEWER: This date is before the Date of Interview (^PSIntdat). Please change!*

**ConNew**

"INTERVIEWER: Please read the details below, and confirm they are correct.

Address:

[^nAdd1]

[^nAdd2]

[^nAdd3]

[^nAdd4]

PC: [^NAddPc]

Phone : [^NTel]

Go back and change if not correct."

1 Correct,

2 **NOT** correct

**SHOWCARD HELP**

*IF (PIndOrAdm = 1) and [IF (PIAsk <> Yes)]*

**FqHelp**

INTERVIEWER: Did the respondent need any help reading the showcards during the interview?

1 Yes - due to sight problems

2 Yes - due to literacy problems

- 3 Yes – due to technical problems
- 4 Yes - due to other problems
- 5 Yes - don't know reason
- 6 No

*If needed help with showcard due to technical or other reasons [!F (FQHelp = 3 or 4)]*

**FQHelpO**

"INTERVIEWER: Please specify the problems."

String [50]

END OF FILTER

END OF FILTER

**Prompt to do the walking test appers here in the CAPI**

## GIFT CARD ADMINISTRATION

*IF either respondent or proxy wants a physical gift card [EvouchP=3 OR VouchProx=1] and interview is face to face [IssMode=1]*

**Afqthk**

INTERVIEWER: You need to complete the gift card administration at the next question

Press 1 and <enter> to allow the program to calculate the interview length.

**IncentRe**

Please give a gift card(s) to the respondent(s)

Press 1 and <enter> to continue.

**Incent**

Did you give any respondents a gift card. Every person interviewed should be offered a gift card.

*IF incentype=conditional*

[^Only give one card per person even if:

- They were interviewed themselves as well as acting as a proxy for another person OR
- They acted as a proxy for more than one person in the household]

*IF incentype=unconditional*

[^In this household ONLY the proxy informants interviewed should be offered a gift card.

Do not issue a gift card to a proxy informant if:

- The proxy informant is a person who already lives in the household and have been issued this wave. You will have seen a message that they have been issued a voucher already when completing their individual interview.

If you have already indicated that they have not received a gift card for their own personal interview. They will be sent a voucher in the post.

Only give one card per person even if:

- They acted as a proxy for more than one person in the household]

- 1. Yes
- 2. No

**IF Incent=1**



**IncentN**

How many incentives did you leave (in current interview)?

*IF incenttype= conditional*

[^Respondents answering in person should receive one voucher each.

If a proxy is done for any reason other than refusal, both the eligible sample member and proxy informant should receive a voucher.

if the proxy was done because of a refusal only the proxy informant should receive a voucher.]

*If incentyp=unconditional*

[^INTERVIEWER: In this household proxy informant(s) should receive a voucher ONLY if they do not live in the household themselves and were proxying for the person for any of the following reasons: refusal, mental incapacity, being away due to illness or not able to do the interview. The gift cards were already issued to the people who live in this household in their advance mailing, and they can be kept]

1. One
2. Two
3. Three
4. Four.

*IF given more than 2 gift cards [IncentN=3 or 4]*

**Icenex**

Please explain who gift cards were given to

STRING [1...200]

END OF FILTER

END OF FILTER

**GiftI** [loop for every gift card]

Please get card(s) ready.

Before handing over...

Write £20 in the circle at the top-right hand corner of the card.

INTERVIEWER READ OUT: I'm just going to get this all set up for you. This will need to be activated by our Head Office, so please wait for three days before using it.

Enter the last 8 digits of the card at the next question

Press 1 and <enter> to continue.

**GiftNX [1-3]**

**1<sup>st</sup> attempt**

String: 8

{IF GiftnX[1] incorrect}

**2<sup>nd</sup> attempt, 1<sup>st</sup> attempted failed please check card number and try again**

String: 8

{IF GiftnX[2] incorrect}

**3<sup>rd</sup> attempt, 2<sup>nd</sup> attempted failed please check card number and try again**

**N.B. THIS IS THE LAST ATTEMPT AT ENTERING THE CARD NUMBER**

String: 8

**{IF GiftnX[1 or 2 or 3] = correct}**

**GiftGood**

INTERVIEWER: Full card number is ^GiftN

Please hand the gift card to the respondent

Press 1 and <Enter to continue>

end of filter

**{IF GiftnX[3] = Incorrect}**

**GiftBad**

INTERVIEWER: The 8 digit numbers you entered have not been recognised.  
Please leave the card and record the number in special action SAS2Act in the admin  
block.

You will need to use code 1 (Yes) at SAS1Act to get to SAS2Act.

Press 1 and <enter> to continue.

END OF FILTER

END OF FILTER

# MEASUREMENT MODULE (MM)

IF CAVI<>1

## 14.1. Timed walk

*IF Respondent's age >= 60*

*[!AgeOF >= 60]*

### **MFIRST \***

INTERVIEWER: This is the Measurements Questionnaire for... [^Name]

1 Press <1> and <Enter> to continue.

### **MINTDAT\_**

INTERVIEWER: Today's date is displayed below. Please amend it if it's not correct.

[Don't Know and Refusal are not allowed]

*[CHECK MM1] SIGNAL: IF the year of the measurement is the same as the interview year AND they are later than the date returned by the program.*

*[MIntDat.YEAR = QInit.IntDat.YEAR AND MIntDat > SYSDATE ]*

*This can't be right. Please check the year.*

### **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 Whether observed respondent walking <> walking without help*

*[MmSchs<> 1]*

### **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

END OF FILTER

*IF (Whether observed respondent walking = walking without help) OR (whether can walk alone without help = Yes)*

*[MmSchs = 1 OR MmAlone = 1]*

### **MMHSS \***

*[^BLANK / I would now like to test whether you can walk a very short distance comfortably (using a walking stick or other aid if necessary).] 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 Whether has medical condition that restricts walking = No Restriction*

*[MmHSS = 1]*

**MMWILL**

Are you willing to do the walking test?

1 Yes

2 No

*IF whether willing to do walking test = Yes*

*[MmWill = 1]*

**MMSAF**

INTERVIEWER: Do you feel that it is safe to continue with the walking test?

1 Yes

2 No

END OF FILTER

END OF FILTER

END OF FILTER

*IF (Whether has medical condition that restricts walking = recent surgery, injury, other condition, DK, RF) OR (whether can walk alone without help = aid unavailable, no, DK, RF) OR (whether interviewer feels it is safe to do walking test = No, don't know, RF)*

*[MmHSS = 2, 3, 4, DK, RF OR MmAlone = 2, 3, DK, RF OR MmSaf = no, DK, 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'.

1 Press <1> and <Enter> to continue.

END OF FILTER

*IF (Whether willing to do the walking test = Yes) AND (Whether interviewer feels it is safe to do the walking test = Yes)*

*[MmWill = 1 AND MmSaf = 1]*

**MMAVSP**

INTERVIEWER: Check availability of suitable space.

1 Suitable space available

2 No suitable space

*IF whether suitable space available = Suitable space*

*[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.

INTERVIEWER: Demonstrate the walk for the respondent.

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

1 Yes

2 No

*IF whether feels walking test would be safe = Yes*

*[MmWala = 1]*

**MMSTRT**

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

INTERVIEWER: 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 to continue.

Range: 1..1

**MMTRYA**

INTERVIEWER: Record results of first 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 result of first walking test = Completed successfully*

*[MmTrya = 1]*

**MMWLKA**

INTERVIEWER: Record time in seconds to two decimal places.

**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.

- 1 Press <1> and <Enter> to continue.

*[CHECK MM2] CHECK: IF Time taken for first walking test is not between 1 and 50 seconds*

*[MMWika < AND MMWika > 50]*

INTERVIEWER: This time is not possible. Please change!

*[CHECK MM3] SIGNAL: IF Time taken for first walking test is greater than 15 seconds*

*IF [MMWika > 15]*

INTERVIEWER: This seems rather high. Please check!

*[CHECK MM4] SIGNAL: IF Time taken for first walking test is shorter than 2 seconds*

*IF [MMWika < 2]*

INTERVIEWER: Are you sure? This seems rather low. Please check!

**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 result of second walking test = Completed successfully*  
*[MmTryb = 1]*

**MMWLKB**

INTERVIEWER: Record time in seconds to two decimal places.

*[CHECK MM5] SIGNAL: IF second walk is NOT between 1 and 10 seconds*

*IF [MMWkB > 1 AND MMWkB <10]*

EDIT: MMWkB is ^MMwkB

Please check!

*[CHECK MM6] CHECK: IF Time take for second walking test is not between 1 and 50 seconds*

*IF [MMWkB < AND MMWkB >50]*

INTERVIEWER: This time is not possible. Please change!

*[CHECK MM7] SIGNAL: IF Time take for second walking test is longer than 15 seconds*

*IF [MMWkB > 15]*

INTERVIEWER: This seems rather high. Please check!

*[CHECK MM8] SIGNAL: IF Time take for second walking test is shorter than 2 seconds*

*IF [MMWkB <= 2]*

INTERVIEWER: Are you sure? This seems rather low. Please check!

*[CHECK MM9] SIGNAL: If there is a difference of more than 5 seconds between walk2 and walk1*

*IF [MMWkB - MMWkA >5]*

INTERVIEWER: The two times are very different from each other. Please check the numbers you have entered!

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

END OF FILTER

*IF (result of first walking test = Completed successfully) OR (result of second walking test = Completed successfully)*

*[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 Type of floor surface = Other*  
 [MmRecR = 5]

**MMRECRO**

INTERVIEWER: Enter other type of floor surface.

String 20

**[Open responses to MMRECRO were coded and then incorporated into MMRECR.]**

END OF FILTER

**MMAID**

INTERVIEWER: Record type of aid used.

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

*IF Type of walking aid used = Other*  
 [MmAid = 5]

**MMAIDO**

INTERVIEWER: Enter other type of aid used.

String 20

**[Open responses to MMAIDO were coded and then incorporated into MMAID.]**

END OF FILTER

END OF FILTER

*IF NOT ((result of first walking test = completed successfully) AND (result of second walking test = completed successfully)) [NOT (MmTrya = 1 AND MmTryb = 1)]*

**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.  
 STRING: 250

**[Open responses to MMCOM were coded into variables: mmcomun mmcomsp mmcomrf mmcomni mmcompa mmcom85 mmcom86]**

Description	Variable	Archive
Unable to walk (safely)	MMcomZ1	mmcomun
Lack of space	MMcomZ2	mmcomsp
Respondent refused	MMcomZ3	mmcomrf
Interview not completed	MMcomZ4	mmcomni
Respondent in pain	MMcomZ5	mmcompa

Not enough time	MMcomZ6	mmcomtm
Problem with stopwatch	MMcomZ7	mmcomsw
respondent felt unsafe due to COVID	MMcomZ88	mmcomcv
Other answer	MMcomZ85	mmcom85
Irrelevant answer	MMcomZ86	mmcom86

END OF FILTER

**MMX**

INTERVIEWER: The Measurements Interview is finished.  
Please enter 1 here to make the program store the current time and date.  
Range: 1..1

**MTHANK**

INTERVIEWER: The Measurements Interview is finished.  
- to return to the Individual Qre, press <Ctrl> <Enter >  
- to start another Individual Qre, press <Ctrl> <Enter >  
- to update the Admin details, press <Ctrl> <Enter/>  
1 Press <1> and <Enter> to continue.

END OF FILTER



# 15. SELF-COMPLETION ADMINISTRATION

**BSC1 Block** (Concurrent interviews – sending 1<sup>st</sup> person to complete)

## SCIntA

I would now like to ask each of you some questions on your own.

[IF VAPI=1 “: " You may remember we sent you a letter in the post telling you about this interview. This included an orange “Your Life Now” self-completion questionnaire.”]

While [^iname[1]] answers these questions I would like [^iname[2]] to leave the room and complete this paper questionnaire. When [^IName[1]] has finished I'll ask [^IName[2]] to come back in and we can swap over so that [^iname[1]] does the paper questionnaire and [^IName[2]] answers the questions on [^his/her] own

[IF W10 mainstage CAVI [VAPI =1]: [^iname[2]] please make sure you complete the questionnaire that has **your name** on. Please can you send this questionnaire in the plastic envelope I sent you. You can send back both questionnaires from your household together in the same envelope.]

**BSC4 block** – (Concurrent interviews – sending 2<sup>nd</sup> person to complete)

## Sc4EndN

This is almost the end of the interview. Thank you very much for taking part. I'm now going to ask [^IName[2]] to come back into the room so I can ask [^him/her] some questions on [^his/her] own.

[IF VAPI=1: Do you have the orange questionnaire I sent to you in the post?]

I would like you to leave the room and complete this paper questionnaire.

[IF W10 mainstage CAVI [VAPI =1]: Please make sure you complete the questionnaire that has **your name** on. Please can you send this questionnaire in the plastic envelope I sent you. You can send back both questionnaires from your household together in the same envelope.]

## Sc4End

[^iname[2]]

Code whether or not ORANGE main self-completion was obtained from [^IName[2]].

INTERVIEWER: Answer this question even if you have already obtained ORANGE questionnaire from them earlier.

INTERVIEWER: If ORANGE questionnaire is incomplete ask respondent to post questionnaire with respondent to be posted back.

1. [IF VAPI<>1 (Comp) Completed by respondent, to be posted by interviewer]
2. [IF VAPI<>1 (Resp) To be posted back by respondent or has been posted already]
3. (Ref) Respondent refused the self-completion
4. (Dif) Respondent unable to complete the self-completion (e.g. literacy/ language difficulties)
5. [IF VAPI = 1 (NewQre) Respondent needs a new questionnaire]
6. [IF VAPI = 1 (NewEnv) Respondent needs a replacement envelope]
7. [IF VAPI = 1 (NewBth) Respondent needs a new questionnaire and an envelope]

### **BSC5 – SC5End**

Code whether or not the self-completion was obtained from [^iname[1]].

INTERVIEWER: Answer this question even if you have already obtained the questionnaire from them earlier.

INTERVIEWER: If the questionnaire is incomplete leave questionnaire with respondent to be posted back"

1. [IF VAPI<>1 (Comp) Completed by respondent, to be posted by interviewer]
2. [IF VAPI<>1 (Resp) To be posted back by respondent or has been posted already]
3. (Ref) Respondent refused the self-completion
4. (Dif) Respondent unable to complete the self-completion (e.g. literacy/ language difficulties)
5. [IF VAPI = 1 (NewQre) Respondent needs a new questionnaire]
6. [IF VAPI = 1 (NewEnv) Respondent needs a replacement envelope]
7. [IF VAPI = 1 (NewBth) Respondent needs a new questionnaire and an envelope]

### **BSC6 – Sc6End – for proxies**

That is the end of the interview. Thank you for taking part.

[^QTxt]

1. [IF VAPI<>1 (Comp) Completed by respondent, to be posted by interviewer]
2. [IF VAPI<>1 (Resp) To be posted back by respondent or has been posted already]
3. (Ref) Respondent refused the self-completion
4. (Dif) Respondent unable to complete the self-completion (e.g. literacy/ language difficulties)
5. [IF VAPI = 1 (NewQre) Respondent needs a new questionnaire]
6. [IF VAPI = 1 (NewEnv) Respondent needs a replacement envelope]
7. [IF VAPI = 1 (NewBth) Respondent needs a new questionnaire and an envelope]

[^QTxt]:

IF (laskpx[1] <> Yes) AND VAPI<>1 THEN QTxt :=

Before I go, I would like to collect the paper questionnaire.

INTERVIEWER: If respondent has lost the self-completion please give them a new one along with a reply paid envelope.

ELSE IF (laskpx[1] <> Yes) AND VAPI<>1 THEN QTxt :=

Before I go, I would like to give you this paper questionnaire for you to complete in your own time.

INTERVIEWER: Give the self-completion to respondent. Make sure you complete the details on the front.

ELSE IF (laskpx[1] <> Yes) AND VAPI=1 AND in Wave 10 mainstage THEN QTxt :=

Before I go, I would like to ask you to complete the paper questionnaire I sent you. You can do this in your own time. Please can you send back the questionnaire in the plastic envelope I sent you.



BLOCK BAdmin "Admin Details"

TYPE {BAdmin}

**TChoice =**

Exit (1) "Return to the address menu - without completing the Admin. block",  
Admin (5) "Complete Admin details - and prepare for return to Head Office.INTERVIEWER:  
Do not select code 5 until you are sure you wish to send this questionnaire to Head Office")

LOCALS {BAdmin}

tmpint,T : INTEGER[2]  
idx, idy : INTEGER[2]  
TASCII : INTEGER[3]  
THyph : INTEGER[2]  
nloop,aloop, loop : INTEGER  
txt50 : STRING[50]  
Ind : ARRAY [1..16] OF STRING[40]  
Zero: ARRAY [1..16] OF STRING[2]  
FName : STRING[20]  
Order : ARRAY [1..5] OF STRING[10]  
DAddress : ARRAY [1..5] OF STRING[42]  
DPostCode : STRING[10]  
NDead : INTEGER[2]  
NAITot: INTEGER[2] {All with an outcome}  
iloop,ploop,rloop : INTEGER  
PNumHH : INTEGER  
WhyCodeTxt : STRING[200]

AUXFIELDS

ISer "Individual serial" : 0..9999999999, NODK, NORF  
AName : YForeName  
NoNewAdd : 0..1  
AnyCMNot78 : 0..1  
AnyCMNot95 : 0..1

FIELDS {BAdmin}

Serial\_Num "Admin SN" : 1..999999997

IFFW : ARRAY [1..16] OF BIFFW {*Changed at w6 to put all FFW here. DONT BOOKIN AS COPIED INTO QNames[].QContact anyway*}

AAddNo "Address Number" : 1..99999997

AHHNo"HH Number" : 1..7

Issue\_Num "Issue.": 0..7, EMPTY

Int\_Num "Interviewer Number" : STRING[4], EMPTY, NODK, NORF

IssType "Issue type F = first issue, R = reissue": STRING[1]

PointNum"Point number" : STRING[5]

ChkLet "Check letter" : STRING[1]

Outcome "3 digit outcome field": 0..997

AVer "Qre version" : STRING[10]

ff\_Tel "FFW telnum": STRING[15]

NurSamp

"Is this case in the nurse sample" : YesNo

AnyNurse

"Any nurse visit for this serial number?"

: YesNo

BLOCK BPers "Individual level data"

SETTINGS {BPers}

ATTRIBUTES = EMPTY

FIELDS {BPers}

APersS

"SessP Ind Session for each Person." : 0..97

IssuedNrs "Issued to nurse"

: ( NotIssued (0) "Not issued",

Issued (1) "Issued")

### **NNurse**

"Nurse visit arranged for person 1/person 2":

1. Agree "Agreed to nurse visit",
2. Refuse "Refused nurse visit",
3. NoInt "No main interview/not interviewed",
4. NoElig "Not eligible for nurse visit"

### **DMNurse**

"Nurse agreement for each Person.": YesNo

### **Alncent**

"INTERVIEWER: Did you leave a gift card with the respondent?"

: YesNo

### **OutIndlw {W10Main}**

"Individual outcome code in previous wave"

: 1..99,NODK,NORF

{W10DR: ...}

### **SampStat**

"Whether a respondent is a new entrant ELSA Partner at this wave "

1. NewPart "New entrant partner"  
*{{new IndSer/PersNo generated in the HH Grid and included in data in all output files}}*
2. ExIssd "Existing sample member – issued at wave"
3. ExNotIssd "Existing sample member – not issued at wave"

*{populate for all CM or Partners issued as resident in the HH, or anyone else coded as resident at this wave [new entrant partners or previous wave movers re-joining the HH]}*

**ResStat**

"Final residential status in the household at this wave"

1. ThisHH "Resident in/associated with as institutional resident with this HH", { [DhName = 1 OR DhWhat category 3]}
2. OthHH "Resident in a different HH", {*[if issued as resident but Dhwhat 2, 4 this wave]*}
3. Deceased) { (Dhwhat = 1, DhDiedC = Yes)}

*{compute for ELSA CM and Partners}*

**Rejoiner**

"Whether individual is a previous mover who re-joined HH at this wave"

: (Yes "Yes - rejoiner at this wave") { *SCRIPTING: Compute as 1 if HD.DhBack = PNo*}

ENDBLOCK {BPers}

FIELDS {BAdmin}

QPers : ARRAY[1..16] OF BPers

ASample "Sample type: 0=Panel, 1=Refreshment" : 0..9997

XXB "" : 0..9997

XXC "" : 0..9997

xxD "" : 0..9997

xxE "" : STRING[10]

xxF "" : STRING[10]

Fee "Only visible in test version." : ARRAY [1..20] OF 0..7,EMPTY

Choice "INTERVIEWER: Do you now want to...": TChoice, NODK,NORF

VChoice "Protects Choice": TChoice

**NTot**

"Number of individuals expecting outcome for (not inc dead/inelig)" : 0..97

**NFull**

"Number with individual outcomes 11,21": 0..97

**NProd**

"Number with productive individual outcomes 11,13,21,23": 0..97

**NUnprod**

"Number with unproductive individual outcomes ie NOT 11,13,21,23,79,80"  
: 0..97

**NProxy**

"Number of Proxy/ consultee interviews (13,23)": 0..97

**NFFull**

"Number generating full fee": 0..97

**NFPP**

"Number generating partial or proxy fee": 0..97

**NSCHelp**

"Number generating S/C help fee": 0..97

#### NSCB4

"Number generating S/C posting fee": 0..97

```
{W10DR: ... }  
{If HHNo > 1}
```

#### SplitHH

"INTERVIEWER: This is a split household. People living in this split household should be given an appropriate productive or unproductive code. Respondents who are still living in the original household (SN ^SNPrev) are automatically computed an individual outcome code 88 'Split household: person is now in a different household' in this household."

```
: TContinue  
{... W10DR:}
```

TABLE TIOut

LOCALS

tloop : INTEGER

BLOCK BIOut

PARAMETERS

PSeq : INTEGER

PName : STRING

LOCALS {BIOUT}

ineligunprod : STRING[40]

FIELDS {BIOUT}

IPNo "Person number": 1..97

IndSer "Individual serial" : 0..99999999999, NODK, NORF

```
{W10DR: ...}
```

#### IPMove

"[^PName] has moved away. Before you sign off this case you MUST:

1. Create a new split household [HHNo: ^HHNoNext, Serial: ^SNNext] in CMS
  2. Attempt to contact/interview [^PName], or give them an appropriate unproductive outcome code in the split Serial
  3. In the split Serial, give the ELSA sample member(s) remaining in the current household (SN: ^AllSN) an individual outcome 88 'Split household: person is now in a different household'
- An outcome code 88 will be automatically generated for [^PName] in the current household."

```
: TContinue  
{... W10DR:}
```

#### IndOutC

```
**** [^PNAME] ***
```

INTERVIEWER: Record individual outcome code for person [^PSeq]

- [^PName.]:

- (c11 (11) "Full interview in person",
- c13 (13) "Full interview by Proxy/ consultee",
- c21 (21) "Partial interview in person",
- c23 (23) "Partial interview by Proxy/ consultee",
- c24 (24) "Institutional interview in person",

c25 (25) "Institutional interview by Proxy/ consultee",  
 c31 (31) "No contact",  
 c43 (43) "Refusal before interview",  
 c44 (44) "Refusal during interview (computed)",  
 c45 (45) "Broken appointment - no re-contact",  
 c46 (46) "Office refusal",  
 c51 (51) "Ill at home during survey period",  
 c52 (52) "Away/ill in hospital during survey period",  
 c53 (53) "Physically or mentally unable/incompetent – no proxy",  
 c54 (54) "Language difficulties",  
 c57 (57) "In an institution, unproductive",  
 c59 (59) "Other unproductive",  
 c60 (60) "Untraced – not in an institution",  
 c61 (61) "Moved to an institution – no address obtained",  
 c62 (62) "Address not attempted – OFFICE APPROVAL ONLY",  
 c66 (66): "Wants to be interviewed F2F (willing to take part but not able/willing to do CAVI)",  
 c67 (67): "Cannot be interviewed now – delay until later tranche (not due to COVID-19 or preference for CAVI/CAPI)",  
 c68 (68): "Want to complete it as CAVI (rather than F2F)",  
 c71 (71) "In an institution (refreshment sample only)",  
 c77 (77) "Ineligible - partner who is now not living with Core Member (refreshment sample only)",  
 c78 (78) "Out of Britain", { (or England for refreshment sample)},  
 c79 (79) "Other ineligible - OFFICE APPROVAL ONLY",  
 c88 (88) "Split household: person is now in a different household",  
 c92 (92) "Allocated to another interviewer (moved out of area)",  
 c95 (95) "Died",  
 c99 (99) "",NODK,NORF

If VAPI=1 (i.e. CAVI): Do NOT display codes 68, 92  
 If VAPI=0: (i.e. F2F CAPI): Do NOT display codes 66,  
 If refreshment sample: Do NOT display codes 24, 25, 57,  
 If existing sample: Do NOT display codes 71, 77

### IndInel

"""" [^PNAME] """"  
 INTERVIEWER: Why have you recorded this person as [^ineligunprod]?"  
 : STRING [100]

### AProxRef

"""" [^PNAME] """"  
 INTERVIEWER: Did you offer a Proxy/ consultee interview?"  
 : YesNo

### AProxNo

"""" [^PNAME] """"  
 INTERVIEWER: Why did you not offer a Proxy/ consultee interview?"  
 : STRING[100]

### AProx

"""" [^PNAME] """"  
 INTERVIEWER: Why was interview conducted by a Proxy/ consultee?"  
 : YPxWhy

### APxOth

"""" [^PNAME] """"  
 INTERVIEWER: Please specify why the respondent requires a Proxy/ consultee interview."  
 : STRING [40]

### APxMent



\*\*\*\* [^PNAME] \*\*\*

INTERVIEWER: Did you obtain signed consent?"

: YesNo

### APxMOth

\*\*\*\* [^PNAME] \*\*\*

INTERVIEWER: Please give a reason."

: STRING[90]

### ScAsk

\*\*\*\* [^PNAME] \*\*\*

INTERVIEWER: Code whether the main self-completion was completed by respondent."

1. {IF VAPI=0} Comp "Completed by respondent, to be posted by interviewer",
2. Return "Respondent has posted it back already",
3. Willpost "Respondent will post it back"
4. Ref "Respondent {IF VAPI=0 was interviewed in person but} did not complete self-completion"

### SCHelp

\*\*\*\* [^PNAME] \*\*\*

INTERVIEWER: Did you help the respondent complete the main self-completion?"

1. Yes "Yes, I helped respondent",
2. No "No, respondent completed it on their own"

if indout=61..63

### CallWill

\*\*\*\* [^PNAME] \*\*\*

INTERVIEWER: Please enter the code which reflects the sample member's willingness to cooperate at this wave.

Enter 10 if no contact @Bor@B you are unable to estimate the willingness."

1. VWill"Very willing",
2. SWill"Somewhat willing",
3. Neither "Neither willing or unwilling",
4. SUNwill "Somewhat unwilling",
5. VUnwill "Very unwilling",
6. NoCont (9) "No contact made/can't say"
7. NODK,
8. NORF

RULES {BIOUT}

IPNo.SHOW

IPNo:= PSeq

IndSer.KEEP

IndSer := ff\_P.IndSer

{W10Main: ...}

IF (HHNo = 1) THEN

IF ((Refresh <> Yes AND (ff\_P.ELSA = Yes OR ff\_P.Partner = Yes) AND (ff\_P.DhName = Yes OR ff\_P.DHWhat = LivElsM)) OR (Refresh = Yes AND ff\_P.ELSA = Yes {AND QHD.EligB = Yes}))

AND (QHD.DMWhat IN [LivElsr,LivElsO]) THEN

IPMove

ENDIF

ENDIF

{... W10Main:}

{W10DR: only generate individual outcome codes for people issued and/or interviewed}

indoutc.KEEP

```

{full in person 11}
IF (askpx <> Yes AND I16full = Yes AND i16comp <> No AND h16comp <> No) THEN
IF (AskInst = Yes) THEN
indoutc:= c24
ELSE
indoutc:= c11
ENDIF
indoutc.ASK
{partial in person 21}
ELSEIF (askpx <> Yes AND (I16full = Yes OR I16part = Yes)) THEN
IF (AskInst = Yes) THEN
indoutc:= c24
ELSE
indoutc:= c21
ENDIF
indoutc.ASK
{full proxy 13}
ELSEIF (askpx = Yes AND I16full = Yes AND i16comp <> No AND h16comp <> No) THEN
IF (AskInst = Yes) THEN
indoutc:= c25
ELSE
indoutc:= c13
ENDIF
indoutc.ASK
{partial proxy}
ELSEIF (askpx = Yes AND (I16full = Yes OR I16part = Yes)) THEN
IF (AskInst = Yes) THEN
indoutc:= c25
ELSE
indoutc:= c23
ENDIF
indoutc.ASK
{refusal during interview}
ELSEIF (I16Star = Yes) THEN
indoutc:= c44
indoutc.ASK
ELSEIF (QHD.QInstMove.DhMiPrx <> EMPTY) THEN
indoutc:= c57
indoutc.ASK
{W10Main: ...}
ELSEIF (ff_Refresh = Yes) AND (ff_P.Partner = Yes) AND (QHD.DMWhat IN [LivElsr,LivElsO]) THEN
indoutc:= c77
indoutc.ASK
ELSEIF (ff_Refresh = Yes) AND (ff_P.ELSA = Yes OR ff_P.Partner = Yes) AND (QHD.DMWhat IN
[LivElsM]) THEN
indoutc:= c71
indoutc.ASK
ELSEIF (ff_P.DHName = Yes) OR (ff_P.DHWhat = LivElsM) OR (QHD.EligB = Yes)
OR ((ff_Refresh = Yes) AND (ff_P.ELSA = Yes OR ff_P.Partner = Yes)) THEN

IF (QHD.DMWhat = Deceased) AND NOT (ff_P.Dead IN [YesN,YesE]) THEN
indoutc:= c95
indoutc.ASK
ELSEIF (QHD.DMWhat IN [LivElsr,LivElsO,CoreHH]) AND (indoutc = EMPTY) THEN
indoutc:= c88
indoutc.ASK
{W10DR: ...}
ELSEIF ((ff_P.ELSA = Yes OR ff_P.Partner = Yes) AND ff_P.IssuedInt.ORD <> 1) THEN
indoutc:= c79
indoutc.SHOW

```

```

... W10DR:}
ELSE
Indoutc
CHECK
NOT(IndOutc IN [c11..c25,c44])
"INTERVIEWER: This outcome code is not valid!
Please amend."
IF (IndOutc = c92) AND (QHD.DMWhat = RESPONSE) THEN
(QHD.DMWhat IN [LivElsr,LivElsO])
"Outcome 92 only applies to people who have moved
away from this address."
ENDIF
IF (IndOutc IN [c71,c77]) THEN
(ff_Refresh = Yes)
"Outcomes 71 and 77 only apply to the refreshment sample."
ENDIF
SIGNAL
NOT(IndOutc IN [c52])
"INTERVIEWER: If respondent is away in hospital,
attempt to conduct a Proxy/ consultee interview before
returning work with this code."
NOT(IndOutc IN [c53])
"INTERVIEWER: Please attempt to conduct a proxy/ consultee
interview before returning work with this code."
NOT(IndOutc IN [c79])
"INTERVIEWER: Please check your coding. Outcome 79 should only be used in extremely rare cases
confirmed with the office.
If mentally/physically incapable for interview - code 53.
If died - code 95.
If moved and cannot find their new address - code 60.
If moved abroad - code 78."
ENDIF
ENDIF
{... W10DR:}

```

```

{W7DR: ...
IF (IndOutc IN [c43,c44,c45,c51,c52,c59]) THEN
FutCon
IF (FutCon = Yes) THEN
FCMnth
IF (NoPref IN FCMnth) "" THEN
CHECK
(FCMnth.CARDINAL = 1)
"'No preference/Any month' is an exclusive code for this question."
ENDIF
SIGNAL
ENDIF
ENDIF
... W7DR:}

```

```

IF (IndOutc IN [c57,c59,c79]) AND (ff_P.IssuedInt.ORD = 1) THEN
IF (IndOutC = c59) THEN
ineligunprod:= 'other unproductive'
ELSEIF (IndOutC = c57) THEN
ineligunprod:= 'in an institution and unproductive'
ELSEIF (IndOutC = c79) THEN
ineligunprod:= 'ineligible at wave 8 / issued in error'
ENDIF
IndInel
ELSEIF IndOutC = c24 THEN

```

```
InstWh
IF InstWh = No THEN
InstXWh
ENDIF
ELSEIF IndOutC IN [c43,c44] THEN
AProxRef
IF (AProxRef=No) THEN
AProxNo
ENDIF
ELSEIF IndOutC IN [c13,c23,c25] THEN
AProx
IF (AProx = Other) THEN
APxOth
ELSEIF (AProx = MenInc) THEN
APxMent
IF (APxMent = No) THEN
APxMOth
ENDIF
ENDIF
ENDIF
IF IndOutc IN [c11,c13,c21,c23,c24,c43,c44,c45,c46,c51,c52,c57,c59] THEN
```

```
{W10DR: ...
ff_Tel := ff_Tele
... W10DR:}
{W7Main: ...}
IF (ff_Tot = 1) THEN
{IF NOT(ff_Refresh = Yes) THEN}
{... W7Main:}
ScB4
IF (ScB4=Yes) THEN
ScComp
ENDIF
ENDIF
ENDIF
```

```
IF IndOutc IN [c11,c21,c24] THEN
SCAsk
IF (SCAsk = RESPONSE) AND (NurSamp <> Yes) "" THEN
CHECK
SCAsk <> Nurs
"INTERVIEWER: Code 3 is not valid for this household.
Please amend"
SIGNAL
ENDIF
IF (SCAsk IN [Comp,Resp,Nurs]) THEN
SCHelp
ENDIF
{W10DR: ...
SxAsk
IF (SxAsk IN [Comp,Resp,Nurs]) THEN
SxHelp
ENDIF
... W10DR:}
IF (IndOutc IN [c11..c59]) THEN
CallWill
ENDIF
ENDIF
{W7DR: ...
IF (ff_Refresh <> Yes) AND (IndOutc IN [c11, c13, c21, c23, c24, c25, c43, c44, c45]) THEN
```

```

SARep
IF (SARep IN [YesBef..YesBoth]) THEN
SAInf
SAFeel
IF (IndOutc IN [c43, c44, c45]) THEN
SARef
ENDIF
ENDIF
ENDIF
... W7DR:}
{
IF IndOutc IN [c11,c21] THEN
LDateTom.KEEP
LDate7Days.KEEP
AGCons.KEEP
ActNo.KEEP
ENDIF
}
RESERVECHECK
RESERVECHECK

ENDBLOCK {BIOUT}

```

```

FIELDS {TIOUT}

```

```

P : ARRAY[1..16] OF BIOut

```

```

AUXFIELDS

```

```

EligAge : ARRAY[1..16] OF INTEGER[3]
EligDate: DATETYPE
DoB : DATETYPE

```

```

RULES {tiout}

```

```

Ntot := 0; NFull:= 0; NProd:= 0; NUnprod:= 0; NProxy:= 0
NFFull:= 0; NFPP := 0; NDead:= 0; NAITot:= 0
NSCHelp := 0; NSCB4 := 0

```

```

FOR tloop:= 1 TO 16 DO

```

```

{W10Main: ...} {WAVEUPDATE - something that will need updating for each wave}
{Add a day to EligDate if DoB is 29th Feb 1968 so that they stay eligible}
IF (ff_P[tloop].DhYear = 1968) AND (ff_P[tloop].DhMonth = 2) AND (ff_P[tloop].DhDay = 29) THEN
EligDate:= (2018,3,1)
ELSE
EligDate:= (2018,2,28)
ENDIF
{... W10Main:}

```

```

IF (ff_P[tloop].DhYear = RESPONSE) AND (ff_P[tloop].DhMonth = RESPONSE) AND (ff_P[tloop].DhDay =
RESPONSE) THEN
DoB := (ff_P[tloop].DhYear, ff_P[tloop].DhMonth, ff_P[tloop].DhDay)
EligAge[tloop]:= AGE(DoB,EligDate)
ELSE
EligAge[tloop]:= 0
ENDIF

```

```

{Grid is completed: eliga=elig from ffwd, eligb=elig after grid}
IF (((QHD.Eliga[tloop] = Yes OR QHD.Eligb[tloop] = Yes)
AND NOT(QHD.QAHD.P[tloop].DhWhat IN [LivElsr,LivElsO]))
{Grid is not completed: Panel sample}
OR ((ff_P[tloop].ELSA = Yes OR ff_P[tloop].Partner = Yes)
AND ff_Refresh <> Yes)
{Grid is not completed: Refreshment sample}
{W10Main: ...} OR (ff_Refresh = Yes AND (ff_P[tloop].ELSA = Yes OR ff_P[tloop].Partner = Yes)))
AND (ff_P[tloop].DHWhat <> Deceased) {... W10Main:}
AND (NOT(ff_P[tloop].Dead IN [YesN,YesE])) THEN
IF (DMName[tloop] = RESPONSE) THEN
AName:= DMName[tloop]
ELSE
AName:= ff_P[tloop].DhNNF
ENDIF
P[tloop](tloop,AName)
IF P[tloop].Indoutc = RESPONSE THEN
NAITot:= NAITot + 1
IF NOT(P[tloop].Indoutc IN [c78..c95]) THEN
Ntot := Ntot + 1
ENDIF
IF P[tloop].Indoutc IN [c11,c21,c24] THEN
Nfull := Nfull + 1
ELSEIF P[tloop].Indoutc IN [c13,c23,c25] THEN
Nproxy := Nproxy + 1
ENDIF
IF P[tloop].Indoutc IN [c11..c25] THEN
Nprod := Nprod + 1
ELSE
Nunprod:= Nunprod + 1
ENDIF
IF P[tloop].IndOutc IN [c11,c24] THEN
NFFull:= NFFull + 1
ELSEIF P[tloop].IndOutc IN [c13,c21,c23,c25] THEN
NFPp := NFPp + 1
ENDIF
IF (P[tloop].Indoutc = c95) THEN
NDead := NDead + 1
ENDIF
ENDIF
IF (P[tloop].SCHelp = Yes) THEN
NSCHelp := NSCHelp + 1
ENDIF
{W7DR: ...
IF (P[tloop].SxHelp = Yes) THEN
NSxHelp := NSxHelp + 1
ENDIF
... W7DR:}
IF (P[tloop].SCB4 = Yes) THEN
NSCB4 := NSCB4 + 1
ENDIF
ENDIF
ENDDO

ENDTABLE {Tiout}

FIELDS {bAdmin}

QIOut : TIOut

```

*IF Indoutc=95 (dead) and Questions on EOL not answered in the EARF*

**C\_Whendied** {IF DiedFlag=Yes AND Surveystatus in initial sample file was = eligible AND date of death not given in HH grid}

INTERVIEWER: How recently did the respondent die?

1. Less than 2 months ago
2. 2 or more months ago
3. Not sure

NODK, NORF

SOFT CHECK: If C\_Whendied=1 “We will not issue the case until it has been at least 2 months since they died. However, if you are able to identify who could do the EoL interview now then please do.”

**C\_Year died** {If C\_Whendied=2}

Enter Year of death. If not known leave blank

2015...2023

**C\_Month died** {If Year died=RESPONSE}

Enter Month of death. If not known code 99

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. Septembjer
10. October
11. November
12. December
99. Not known

**C\_TelEOL** {IF C\_Whendied=1, 2 or 3 OR date of death given in HH grid}

INTERVIEWER: Please try and find someone to do an End of Life interview with.

Please code the outcome of this call. Once you have finished the questions about this call and returned to the Case Breakdown Screen, click on Sign off Case and complete final admin.

1. I have found someone to do an End of Life interview - **in my area** – ALLOCATE ME CASE

2. I have found someone to do End of Life interview – **Outside of my area** – ALLOCATE TO DIFFERENT INTERVIEWER
3. **I will attempt to find someone** to do End of Life interview with – ALLOCATE ME CASE
4. OFFICE APPROVAL ONLY: I am not able to use **all the contact details to find someone** to do End of Life interview with – ALLOCATE TO DIFFERENT INTERVIEWER
5. I have tried **all attempts** to find someone but there is no one willing/available – DO NOT ISSUE

NODK, NORF

SOFTCHECK if C\_TEIEOL = 1: “When you have finished the remaining questions, sign off this case and you will be sent the case in the End of Life project instead. Please use this to record future contacts and the interview.”

SOFTCHECK if C\_TEIEOL = 2: “When you have finished the remaining questions, sign off this case. The case will be allocated to another interviewer to carry out the interview with.”

SOFTCHECK if C\_TEIEOL = 3: “Sign off this case now and you will be sent the case in the End of Life project instead. Please record your attempts to find a respondent in there.

SOFTCHECK if C\_TEIEOL = 4: “Check with office before using this code. You should attempt to finalise this case yourself if possible.

SOFTCHECK if C\_TEIEOL = 5: “Are you sure that you have used all the available contact details for this household to try and find someone to do the End of Life interview? Code 3 or 4 to enable further attempts to be made”

[Update surveystatus with response to **C\_TelNStatus if died**]

**EOLInfna** {If C\_TEIEOL = 1 or 2}

Who do you think will be the End of Life respondent?

1. {Name of OTHER eligible ELSA sample member 1 – i.e. exclude person loop about}
2. {Name of other eligible ELSA sample member2}
3. Other person in household
4. Proxy nomination: {Name of proxy nomination}
5. Stable contact: {Name of stable contact}
6. Other person outside household
7. Not sure yet

1. {Name of OTHER eligible ELSA sample member 1 – i.e. exclude person loop about}
2. {Name of other eligible ELSA sample member2}

VARLAB: Who expects to do EOL interview

**EOLAddchk** {If EOLInfna = 1 thru 6 and we have address for this person in FF}

Please check if we have the name, telephone number and address that we have for this person is correct:  
{Full name, telephone number and Address on file}



1. Yes – name, telephone number and address are correct and complete
2. No - name and address need updating

VARLAB – Whether proxy informant address on file correct

### **EOLAdd1 to EOLPC**

{If EOLInfna = 4 thru 6 and (we have address for this person in FF or EOLAddchk=2)}

Vars needed (if possible populate with existing details so only needs to overwrite wrong ones)

First name Surname

Relationship to respondent

Gender

Address lines 1-4

Telephone number

Postcode

Confirmation of name and address q

STRING [250]

### **Out3d**

*Note for programmer: this should now be automated and not inserted by the interviewer.*

1. c110 (110) "@MAll eligible respondent(s) interviewed in person",
2. c120 (120) "@MAll eligible respondent(s) interviewed (some by proxy/ consultee)",
3. c210 (210) "@MSome but not all eligible respondents intvwd",
4. c310 (310) "@MNo contact with anyone at address",
5. c410 (410) "@MOffice refusal",
6. c430 (430) "@MRefusal at introduction/ before HH module",
7. c440 (440) "@MRefusal after HH module",
8. c450 (450) "@MBroken appointment - no re-contact",
9. c510 (510) "@MIII at home during survey period",
10. c520 (520) "@MAway from home/in hospital during survey period",
11. c530 (530) "@MPhysically/ mentally unable/incompetent – no proxy",
12. c540 (540) "@MLanguage difficulties",
13. c570 (570) "@MAll respondents in an institution and unproductive",
14. c590 (590) "@MOther unproductive",
15. c612 (612) "@MOFFICE APPROVAL ONLY - Address not attempted",
16. c613 (613) "@MMoved - no follow-up address obtained",
17. c614 (614) "@MMoved - no follow up for institution address obtained",
18. c615 (615) "@MMoved - follow-up address outside area",
19. c616 (616) "@MWant to be interviewed F2F (willing to take part but not able/willing to do CAVI)",
20. c617 (617) "@MCannot be interviewed now – delay until later wave (not due to COVID-19 or CAVI/CAPI)",
21. c618 (618) "@MWant to complete it as CAVI (rather than F2F)",
22. c619 (619) "@MIssued but not attempted due to local/national lockdowns",
23. c710 (710) "@MAll core member(s) in an institution (refreshment sample only)",
24. c780 (780) "@MAll core member(s) moved out of Britain (or England for refreshment sample)",
25. c781 (781) "@MAll core member(s) died",
26. c790 (790) "@MOFFICE APPROVAL ONLY - All of the sample are ineligible"

If VAPI=1: Do NOT display codes 433, 615, 618, 619, 620, 630

If VAPI=0: Do NOT display codes 616

If refreshment sample: Do NOT display codes 710, 780

**JAWhyRef**

"INTERVIEWER: What reasons were given for the refusal? Only code 'Other' if reason for refusal is not listed below.

CODE ALL THAT APPLY."

: SET OF

1. Short "Short term commitments (interview would not be convenient at this time)",
2. Long "Long term commitments (ie. will be too busy in the foreseeable future)",
3. Pers "Questions are too personal",
4. Time "Interview is too long",
5. Conf "Concerned about confidentiality",
6. Subj "Not interested in the survey subject matter",
7. Ben "Survey does not have public or personal benefit: survey is a waste of time",
8. Circ "Circumstances have not changed since last interview",
9. Spou "Spouse or partner opposes participation",
10. Fam "Other family member opposes participation",
11. Other

### **AWhyRX**

"INTERVIEWER: What other reason was given for refusal?"

: STRING[150]

{IF (Out3d = RESPONSE AND Out3d <>110)}

### **OCInfo**

"Please record any further comments on this outcome code."

- For example, reason for refusal, how firm a refusal

{IF OC = 310: "E.g. was there anything to suggest they've moved"}

{IF OC = 430, 450: "E.g. reasons for refusal, how firm a refusal"}

{IF OC = 510, 530: "E.g. nature of illness/impairment"}

{IF OC = 520: "E.g. where respondent is and for how long"}

{IF OC = 781: "E.g. who spoken to"}

{IF OC = 612: "E.g. why was this, was it an interviewer or respondent issue?"}

{IF OC = 616, 618: "E.g. reasons for this, did all eligible members agree"}

{IF OC = 617: "E.g. reasons for this, who spoken to"}

{IF OC = 620: "E.g. reasons why address is inaccessible and how long this is expected to last"}

{IF OC = 620, 630: "E.g. attempts made to locate address to date, who spoken to"}

{IF OC = 780: "E.g. who spoken to, how long expected to be away"}

{IF OC = 790: "E.g. why are they ineligible"}

{IF OC = 570: "E.g. why unproductive (i.e. unable to make contact, refused to take part, care home manager did not consent etc"}

OPEN [500] , NODK, NORF

### **NoRevisit**

"INTERVIEWER: Please record whether you experienced any of the following at the contacted address."

: SET OF

1. C1 "All ELSA members mentally incapable of interview (e.g. senile)",
2. C2 "All ELSA members physically incapable of interview (e.g. long term sickness or hospitalised for next two months",
3. C3 "Household recently bereaved",
4. C4 "Household recently suffered critical/terminal illness",
5. C5 "Violent or threatening behaviour towards interviewer",
6. None "None of these"

{WAVEUPDATE - something that will need updating for each wave}

ask if outcome = 617 instead

### **WhenR**

"INTERVIEWER: Please indicate the earliest month in which this case can be reallocated back to an ELSA Wave 10 interviewer.":

(m1 "August 2018",  
m2 "September 2018",  
m3 "October 2018",  
m4 "November 2018",  
m5 "December 2018",  
m6 "January 2019",  
m7 "February 2019",  
m8 "March 2019",  
m9 "April 2019",  
m10 "May 2019",  
m11 "June 2019",  
AfterFW "Not available until after June 2019",  
Other (95) "Other/ Unknown (Please specify)",NoDK,NoRF

### WhenRo

"INTERVIEWER: Please enter other answer"  
: STRING[60]

{W7Main: ...}

### FfwFdBk

"INTERVIEWER: Did you experience any problems with feed forward data during the interview?": YesNo

### FfwDesc

"INTERVIEWER: Please describe the nature of the problem with the feed forward data (i.e. questions/topics affected). If you have been unable to conduct interviewing, please contact Support/the Helpline @bas a matter of urgency@b.": STRING [300]

{... W7Main:}

{Tracing}

BLOCK BTrace

LOCALS {BTrace}

LDeceasedMoved : STRING[200]

RULES {BTrace}

{W10DR: added ...}

LDeceasedMoved := "

IF (Out3d = c780) THEN

LDeceasedMoved := 'INTERVIEWER: If the issued address was the ' +  
'@Blatest known address in Great Britain@B ' +  
'for the Core Members who have moved abroad ' +  
'code 2 No.'

ELSEIF (Out3d = c781) THEN

LDeceasedMoved := 'INTERVIEWER: If the issued address was the ' +  
'@Blatest known address in Great Britain@B ' +  
'for the Core Members who have deceased code ' +  
'2 No.'

ENDIF

Move

IF Move = No "" THEN

SIGNAL

(Out3d <> c613)

"INTERVIEWER: You have recorded household outcome as 613 -  
'NO follow-up for private address obtained', but have

recorded they have not moved. Please check and amend."

SIGNAL

(Out3d <> c614)

"INTERVIEWER: You have recorded household outcome as 614 -  
'NO follow up for institution address obtained', but have  
recorded they have not moved. Please check and amend."

SIGNAL

(Out3d <> c615)

"INTERVIEWER: You have recorded household outcome as 615 -  
'Given follow-up address in Britain / England, but not in  
interviewing area', but have recorded they have not moved.  
Please check and amend."

CHECK: IF Out3d=615 but no information of new address has been collected code as 613 moved with no  
new address.

ENDIF

{... W10DR: added}

IF (Move = Yes) THEN

NumTrace

AddUp

IF (AddUp=No) THEN

TraceMthd1

IF (Out3d IN [c310,c613,c614]) THEN

SIGNAL

Phone IN TraceMthd1

"INTERVIEWER: You have not attempted to phone the respondent(s)."

IF NOT (Phone IN TraceMthd1) THEN

RespChk

ENDIF

SIGNAL

CurrOcc IN TraceMthd1

"INTERVIEWER: You have not attempted to make contact with the current occupant(s)."

IF NOT (CurrOcc IN TraceMthd1) THEN

COChk

ENDIF

SIGNAL

Neig IN TraceMthd1

"INTERVIEWER: You have not attempted to make contact with the neighbours."

IF NOT (Neig IN TraceMthd1) THEN

NeighChk

ENDIF

SIGNAL

Stable IN TraceMthd1

"INTERVIEWER: You have not attempted to make contact with the stable contact."

IF NOT (Stable IN TraceMthd1) THEN

StabChk

ENDIF

ENDIF

IF (Phone IN TraceMthd1) THEN

TelResp

IF (TelResp=Other) THEN

TelRespOth

ENDIF

ENDIF

IF (CurrOcc IN TraceMthd1) THEN

CurOcc

IF (CurOcc<>Cont) THEN

MovLetCO

SIGNAL

MovLetCO=Yes

"INTERVIEWER: Please send tracing letter to address."

```
IF (MovLetCO=No) THEN
MovLetNo
ENDIF
ENDIF
ENDIF
```

```
IF (Neig IN TraceMthd1) THEN
```

```
Neigh
```

```
IF (Neigh=Oth) THEN
```

```
NeighO
```

```
ENDIF
```

```
IF (Neigh<>Cont) THEN
```

```
MovLettNe
```

```
SIGNAL
```

```
 MovLettNe=Yes
```

```
"INTERVIEWER: Please send tracing letter to the neighbours."
```

```
IF (MovLettNe=No) THEN
```

```
MovLetNoNe
```

```
ENDIF
```

```
ENDIF
```

```
ENDIF
```

```
IF (Stable IN TraceMthd1) THEN
```

```
StabCon
```

```
IF (StabCon=Other) THEN
```

```
StabConO
```

```
ENDIF
```

```
IF (StabCon<>Cont) THEN
```

```
MovLettSt
```

```
SIGNAL
```

```
 MovLettSt=Yes
```

```
"INTERVIEWER: Please send tracing letter to the stable contact."
```

```
IF (MovLettSt=No) THEN
```

```
MovLetNoSt
```

```
ENDIF
```

```
ENDIF
```

```
ENDIF
```

```
IF (Proxy IN TraceMthd1) THEN
```

```
ProxCon
```

```
IF (ProxCon=Other) THEN
```

```
ProxConO
```

```
ENDIF
```

```
IF (ProxCon<>Cont) THEN
```

```
MovLettPr
```

```
SIGNAL
```

```
 MovLettPr=Yes
```

```
"INTERVIEWER: Please send tracing letter to proxy/ consultee nomination."
```

```
IF (MovLettPr=No) THEN
```

```
MovLetNoPr
```

```
ENDIF
```

```
ENDIF
```

```
ENDIF
```

```
IF (Regist IN TraceMthd1) THEN
```

```
ElecReg
```

```
ENDIF
```

```
IF (Agency IN TraceMthd1) THEN
```

EstAg  
ENDIF

IF (Other IN TraceMthd1) THEN  
OthMeth  
OthAd  
ENDIF

ENDIF  
ENDIF

ENDBLOCK {BTrace}

FIELDS {BAdmin}

*{New section: Checking possible split off mover details Split households are only prompted and generated if the household grid has been completed, i.e. in cases with a productive HHNum 1. Generation of next wave feed-forward to split the household and capturing of data on household members systematically would be very complicated without the HH Grid data completed. If a household is unproductive and has someone marked as a possible mover, we therefore want to add a few questions to check the latest mover status (which for productive households would be done as part of HHGrid enumeration):}*

BLOCK BSplit

PARAMETERS

PSeq : INTEGER  
PName : STRING

FIELDS {BSplit}

SplitPer "Person number": 1..97

SplitSer "Individual serial" : 0..99999999999, NODK, NORF

*{if HHNum = 1 and Out3d= 310..790 and someone in the HH has ff\_PossMover = Yes}*

#### **ChkSplit**

"INTERVIEWER: [**^PName**] is marked as a possible split off mover from the issued household address, with the reported/suspected new address of:

**^ff\_[PSeq].Add1**  
**^ ff\_[PSeq].Add2**  
**^ ff\_[PSeq].Add3**  
**^ ff\_[PSeq].Add4**  
**^ ff\_[PSeq].PCode**

Please confirm the latest known information about [**^pname**]."

: (Here"Person NOT moved out - still lives with the other HH member(s)",

Suspected "Person moved from the HH - lives at the suspected new address (**^ff\_[PSeq].Add1**)",

Different "Person moved from the HH - lives at a different new address ONLY CODE IF HAVE A FULL NEW ADDRESS",

Unknown"Unknown - no (sufficient) information obtained")

SOFT CHECK: If Chksplit=2,3,4 "If this is a split household then before you sign off this case you MUST:

1. Create a new split household [**HHNo: ^HHNoNext, Serial: ^SNNext**] in CMS

2. Attempt to contact/interview the eligible sample members in that other household, or give them an appropriate unproductive outcome code in the split Serial

3. In the split Serial, give the ELSA sample member(s) remaining in the current household an individual outcome 88 'Split household: person is now in a different household'

4. Make sure that you have given an individual outcome 88 to any ELSA sample members who have moved out in THIS current household.

**PossMover** {*computed*}

"Latest known/suspected split off mover status after this wave (if HH unproductive)"

: (Yes)

RULES {BSplit}

SplitPer.SHOW

SplitPer := PSeq

SplitSer.KEEP

SplitSer := ff\_P.IndSer

*ChkSplit {if HHNum = 1 and Out3d= 310..790 and someone in the HH has ff\_PossMover = Yes}*

PossMover.KEEP

IF (ChkSplit IN [Suspected..Unknown]) THEN

PossMover := Yes

ELSE

PossMover := EMPTY

ENDIF

SplitAdd1.KEEP

SplitAdd2.KEEP

SplitAdd3.KEEP

SplitAdd4.KEEP

SplitAddPC.KEEP

*IF (ChkSplit IN [Suspected,Unknown]) THEN*

*SplitAdd1 := ff\_Add1*

*SplitAdd2 := ff\_Add2*

*SplitAdd3 := ff\_Add3*

*SplitAdd4 := ff\_Add4*

*SplitAddPC := ff\_PCode*

*ENDIF*

IF (ChkSplit = Different) THEN

SplitAdd1.ASK

SplitAdd2.ASK

SplitAdd3.ASK

SplitAdd4.ASK

SplitAddPC.ASK

ENDIF

ENDBLOCK {BSplit}

FIELDS {BAdmin}

Split : ARRAY[1..16] OF BSplit

XX1 "spare": STRING[20]

BLOCK BNames

PARAMETERS {BNames}

PINo : INTEGER

LOCALS {BNames}

tt : INTEGER

LNTtl : STRING[50]

LNNam : STRING[50]

LNSNam : STRING[50]

LNrel : STRING[50]

LNAda : STRING[50]

LNadb : STRING[50]

LNadc : STRING[50]

LNadd : STRING[50]

LNadpc : STRING[50]

LNTel : STRING[50]

Order : ARRAY [1..5] OF STRING[10]

T : INTEGER[2]

enter : STRING[10]

correct : STRING[250]

FIELDS {BNames}

IndSer "Individual serial" : 0..99999999999, NODK, NORF

INCLUDE "BContact.inc"

INCLUDE "bmisetaup.inc"

FIELDS

IPNo "Personnumber": 1..97

FinStat

"Sample type - interacts with ELSA and Partner" : -999..997

ARespDoB

"Respondent's date of birth" : DATETYPE

ARespAge

"Respondent's age": YAge

ARespSex

"Respondent's sex": YSex

ARespWts

"Weight outcome."

: YRespWts

AWeight

"Weight (kg) including unreliable measures"

: 1.0..200.0

QContact "**^DMname**[IPNO]": BContact

QMISetup : BMISetup

{\*\*\* get all of these from bmisetaup.inc MIPriNam etc }



RULES {BNames}

{NB Block called for unproductives only - relevant productive responses computed in from outside}

IPNo.SHOW

IPNo:= PINo

IndSer.KEEP

IndSer := ff\_P.IndSer

IF (DMName = RESPONSE) THEN

AName:= DMName

ELSE

AName:= ff\_P.DhNNF

ENDIF

{W8DR: ...

IF ((QIOut.p.IndOutC = c95) OR (QHD.QAHD.P.DhDiedC = Yes))

AND (QHD.QAHD.P.Dead <> YesN)

AND (Pilot <> Yes) AND (ff\_Refresh <> Yes)

THEN

IF (DMExit IN [1..12]) THEN

{Copy details from indsess}

{This is complicated - person in each of the ind sessions could have answered these questions for up to 12 people. DMExit[IPNO] is the person number who answered the questions for IPNo so copied over in grules.inc if already answered}

AExit := Yes

QESetup.KEEP(2,IPNo,AName,DMSex,DMExit)

ELSE

AExit

IF AExit = Yes THEN

QESetup(2,IPNo,AName,DMSex,97)

ELSEIF AExit = No THEN

ExTrac

IF (Other IN ExTrac) THEN

ExTracO

ENDIF

ENDIF

ENDIF

ENDIF

... W8DR:}

IF (DMInst IN [Personal..ProxyOth])

AND (ff\_P.DhWhat <> LivEIsM)

THEN

{Check if already done in ind session }

IF (QInd[SessP[QHD.DHResp]].QELBMI[SessL[QHD.DHResp]].QMISetup.FqMiPrx = RESPONSE)

OR (QInd[SessP[QHD.DHResp]].QELBMI[SessL[QHD.DHResp]].QMISetup.FqMiAdd = RESPONSE)

THEN

QMISetup.KEEP(1,IPNo,DMInst.ORD,AName,DMSex)

ELSE

QMISetup(2,IPNo,DMInst.ORD,AName,DMSex)

ENDIF

ENDIF

{Issued respondent}

LFutMail:='for the respondent'

IF (QIOut.P.IndOutC IN [c11,c13,c24,c25]) OR

(QIOut.P.IndOutC IN [c21,c23] AND QInd[SessP].QContact[SessL].Futmail = RESPONSE) THEN

{details from indsess copied in rules.inc}

```
QContact.KEEP(IPNo,  
2,  
97,  
DMName,  
AskPx,  
DMname,  
'is',  
DMSex,  
QHD.Couple,  
Qinit.IntDat,  
Outcome,  
ORD(QIOut.P.IndOutC))
```

```
{Add any other outcome codes not to be asked contact questions}  
ELSEIF (NOT (QIOut.P.IndOutC IN [c95])) AND (QHD.QAHD.P[nloop].DhDiedC <> Yes) THEN
```

```
QContact.PIFFW := ff_[IPno]  
QContact(IPNo,  
2,  
99,  
AName,  
Yes,  
AName,  
'is',  
DMSex,  
QHD.Couple,  
Qinit.IntDat,  
Outcome,ORD(QIOut.P.IndOutC))
```

```
ENDIF
```

```
RESERVECHECK  
RESERVECHECK
```

```
LAYOUT
```

```
BEFORE IpnoNEWPAGE
```

```
ENDBLOCK {BNames}
```

```
FIELDS {BAdmin}
```

```
QNames : ARRAY [1..16] OF BNames
```

### **NewAdd**

```
"INTERVIEWER: Did the respondent(s) tell you that they were planning to move from this address? Did you  
record the new address?": YesNo
```

### **NAdd1**

```
"INTERVIEWER: What is the new address?  
First line...": STRING[30],NODK,NORF
```

### **NAdd2**

```
"Second line...": STRING[30],NODK,NORF,EMPTY
```

### **NAdd3**

```
" Third line...(Just press <Enter> if no more to add.)"  
: STRING[30],EMPTY,NODK,NORF
```

#### **NAdd4**

"Fourth line...(Just press <Enter> if no more to add.)"  
: STRING[30] ,EMPTY,NODK,NORF

#### **NAddPc**

" Postcode..." : STRING[10], DK

#### **NTel**

"INTERVIEWER: Enter telephone number of the new address. Include standard code. If not obtained, enter <Ctrl K>." : STRING[15]

#### **NewDat**

"INTERVIEWER: Please enter date moving to this address.": DATETYPE

#### **ConNew**

"INTERVIEWER: Please read the details below, and confirm they are correct.

Address: ^nAdd1 ^nAdd2 ^nAdd3 ^nAdd4 PC: ^NAddPc

Phone : ^txt50

Go back and change if not correct.":

1. Correct "Correct",
2. NotCorr "Not correct"
3. NODONTKNOW,
4. NOREFUSAL

#### **SASRF**

"INTERVIEWER: Has a special report form been filed for this address / serial number / case or are you intending to do so? A Special Report Form should be filed without delay if you think there is a risk to interviewer safety at this address." / "Special report form"

1. YesDone "Yes, report already filed",
2. YesInt"Yes, not yet filed but intending to",
3. No "No, not intending to file report"),
4. NODK,
5. NORF

*IF FF\_SAAinfA= RESPONSE*

#### **SAAinfAcheck**

Do you want to keep or amend the following information about the directions to address/description of address?

[^ff\_SAAinfA]

1. Keep, the information is correct.
2. Amend, the information is incorrect.

End of filter

*IF SAAinfAcheck=2*

#### **SAAInfA**

"INTERVIEWER:

Please enter any information which will be useful when the household is re-contacted concerning.....**Directions to address/ description of address**

If no info, press <Enter> to leave empty."

/ "Useful information on the household \_directions"

: STRING[250], EMPTY

End of filter

**Note to programmer IF SAAinfcheck=1, THEN populate SAAinfA with ff\_SAAinfA**

*IF ff\_SAAInfB= RESPONSE*

**SAAInfBcheck**

Do you want to keep or amend the following information about practicalities of getting hold of respondent's/ best time of day/best day etc?

[^ff\_SAAInfB]

1. Keep, the information is correct.
2. Amend, the information is incorrect.

End of filter

*IF SAAInfBcheck=2*

**SAAInfB**

"INTERVIEWER:

Please enter any information which will be useful when the household is re-contacted concerning **Practicalities of getting hold of respondent(s)/ best time/ best day**

If no info, press <Enter> to leave empty."

/ "Useful information on the household \_directions"

: STRING[250], EMPTY

End of filter

**Note to programmer IF SAAInfBcheck=1, THEN populate SAAInfB with ff\_SAAInfB**

*IF ff\_SAAInfC=RESPONSE*

**SAAInfCcheck**

Do you want to keep or amend the following information about the directions to address/description of address?

[^ff\_SAAInfC]

1. Keep, the information is correct.
2. Amend, the information is incorrect.

End of filter

*IF SAAInfCcheck=2*

**SAAInfC**

"INTERVIEWER:

Please enter any information which will be useful when the household is re-contacted concerning **Anything else which would be helpful for a future interviewer**

If no info, press <Enter> to leave empty."

/ "Useful information on the household \_directions"

: STRING[250], EMPTY

End of filter

**Note to programmer IF SAAInfCcheck=1, THEN populate SAAInfC with ff\_SAAInfC**

**BestT**

"INTERVIEWER: As this is a panel study, you will be revisiting this household in the future. Which is the best time to call?"

: (am9 "9 am - 12 pm",

pm1 "12 pm - 3 pm",

pm4 "3 pm - 6 pm",

pm7 "6 pm - 9 pm",

am "Any time in morning (before midday)",

pm "Any time in afternoon (after midday)",  
any "Any time at all")

### **BestD**

"INTERVIEWER: Which is the best day to call?

CODE ALL THAT APPLY."

: SET [4] OF

(Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday,

AnyWD "Any weekday",

AnyWE "At the weekend")

### **SABarr {IF CAVI=NO}**

"INTERVIEWER: This is a new address please record details of the area. Were there any physical barriers to entry present at the house/flat/building?

CODE ALL THAT APPLY."

SET [4] OF

1. LockEnt "Locked common entrance",
2. LockGat "Locked gates",
3. Gatek "Security staff or other gatekeeper",
4. EntryP "Entry phone access",
5. None "None of these",
6. Unab (8) "Unable to obtain information"

*{Derived from SABarr}*

*SALEnt "Locked common entrance" : (No (0), Yes)*

*SALGat "Locked gates" : (No (0), Yes)*

*SAGatek "Security staff or other gatekeeper" : (No (0), Yes)*

*SAEPhon "Entry phone access" : (No (0), Yes)*

### **SADType {IF CAVI=NO}**

"INTERVIEWER: Which of these best describes the selected flat or house (i.e. the selected dwelling unit) of the intended respondent?"

/ "Description of the selected flat or house (i.e. the selected dwelling unit) of the intended respondent"

1. Dethou "Detached house",
2. semi "Semi-detached house",
3. terr "Terraced house",
4. purflat "Flat or maisonette - purpose built",
5. conflat "Flat or maisonette - conversion",
6. other "Other",
7. Unab (8) "Unable to obtain information"

### **Area {IF CAVI=NO}**

"INTERVIEWER: Which of these best describes the condition of residential properties in the area?

CODE ONE ONLY"

1. Good "Mainly good",
2. Fair "Mainly fair",
3. Bad "Mainly bad",
4. Vbad "Mainly very bad",
5. Unab (8) "Unable to obtain information"

### **CondDU {IF CAVI=NO}**

"INTERVIEWER: How is the external condition of the selected flat or house (i.e. the selected dwelling unit) relative to other residential properties in the area?

CODE ONE ONLY"

1. Bet "Better",
2. Same "About the same",
3. Worse "Worse",
4. Unab (8) "Unable to obtain information"

### **SASupFlg**

"INTERVIEWER: Was a supervisor present for all or part of this interview?"  
: (Yes "Yes - present for all or part",  
No "No - not present"), NODK,NORF

INCLUDE "BStdAdmin.inc"

### **IntDone**

"INTERVIEWER: Have you completed all post-interviewing coding, checking and notes?  
If you Code 1 (Yes) you will not be able to re-access the case after this point."  
(Yes"Yes, completed all coding etc.",  
1. No "Not yet"  
2. NODK,  
3. NORF

### **EdDone**

"EDITOR: Have you completed all editing and coding?"  
1. Yes "Yes, completed all editing.",  
2. No "Not yet"),  
3. NODK,  
4. NORF

XX2 "spare": STRING[20]

Date\_Of\_Receipt : STRING[17]

INCLUDE "QTGC.inc"

AUXFIELDS {BAdmin}

### **Info**

"INTERVIEWER: That completes the Admin details.  
Press <Enter> to leave the questionnaire."  
: (Out "Exit"),EMPTY

{EDIT}

### **EdInfo**

"EDITOR: That completes the edit.  
Press the <F7> key to edit the next serial number.  
Press <Ctrl F7> to bring up the browser menu.  
Press <Alt X> to finish editing."  
: (Out "Exit"),EMPTY

RULES

Serial\_Num.KEEP

*{W6 - as part of tidying up admin easier to put all the ind feed forward data here.*

*Has to be loaded into QContact so same code can be used in calls to QContact in Admin and IndSess}*

FOR idx := 1 TO 16 DO

ff\_[idx]KEEP

ENDDO

IF AII SN = RESPONSE THEN

Serial\_Num:= AII SN

```

ENDIF
ChkLet.KEEP
CheckLetter(Serial_Num,ChkLet)
AAddNo.KEEP
AHHNo.KEEP
IF AddNo = RESPONSE THEN
AAddno:= AddNo
ENDIF
IF HHNo=RESPONSE THEN
Ahhno:= hhNo
ENDIF
Issue_Num.KEEP
Int_Num.KEEP
IssType.KEEP
IF (EditQre = Yes) THEN
Issue_Num
Int_Num
IssType
ENDIF
AVer := QInIt.QVer
NurSamp.KEEP
AnyNurse.KEEP
NurseApp.KEEP
QIOut.KEEP
FOR loop:= 1 TO 16 DO
QPers[loop].KEEP

{W10DR: ...}
{Compute SampStat}
IF (ff_P[loop].ELSA <> Yes) AND (ff_P[loop].Partner <> Yes) AND (QHD.EligB[loop] = Yes) THEN
QPers[loop].SampStat := NewPart
ELSEIF ((ff_P[loop].indser = RESPONSE) AND ff_P[loop].IssuedInt.ORD = 1) THEN
{Compute SampStat = 2 if ff_IndSer = populated and ff_IssuedInt = Yes }
QPers[loop].SampStat := Exlssd
ELSEIF ((ff_P[loop].indser = RESPONSE) AND ff_P[loop].IssuedInt.ORD <> 1) THEN
{Compute SampStat = 3 if ff_IndSer = populated and ff_IssuedInt = No }
QPers[loop].SampStat := ExNotlssd
ELSE
QPers[loop].SampStat := EMPTY
ENDIF
{Compute ResStat}
IF (QHD.QAHD.P[loop].DhName = Yes OR QHD.QAHD.P[loop].DhWhat = LivElsM) THEN
QPers[loop].ResStat := ThisHH
ELSEIF (QHD.QAHD.P[loop].DhWhat IN [LivElsr,LivElsO]) THEN
QPers[loop].ResStat := OthHH
ELSEIF (QHD.DMWhat[loop] = Deceased) THEN
QPers[loop].ResStat := Deceased
ELSE
QPers[loop].ResStat := EMPTY
ENDIF
{Compute Rejoiner}
IF (ff_P[loop].ELSA = Yes OR ff_P[loop].Partner = Yes) AND (loop IN QHD.DhBack) THEN
QPers[loop].Rejoiner := Yes
ELSE
QPers[loop].Rejoiner := EMPTY
ENDIF
{... W10DR:}

ENDDO
IF (ff_Refresh = Yes) THEN

```

```
ASample:= 1
ELSE
ASample:= 0
ENDIF
FOR idx:= 1 TO 20 DO
Fee[idx].KEEP
Fee[idx]:= 0
ENDDO
```

```
{W10Main: ...}
FOR loop:= 1 TO 16 DO
QNames[loop].KEEP(loop)
ENDDO
{... W10Main:}
```

```
RESERVECHECK
RESERVECHECK
```

```
{
HStatus
}
```

```
MenuNote
```

```
Choice
```

```
SIGNAL
```

```
IF Editqre = Yes THEN
```

```
Choice := Admin {EDIT}
```

```
ENDIF
```

```
VChoice.KEEP
```

```
IF (Choice = Admin) AND (VChoice = EMPTY) THEN
```

```
VChoice:= ORD(Choice)
```

```
ENDIF
```

```
IF Choice = Exit THEN
```

```
CHECK
```

```
(VChoice<>Admin)
```

```
"INTERVIEWER: You cannot now select code 1, as this would delete  
the Admin details already entered.
```

```
Please reinstate code 5 at 'Choice'."
```

```
ENDIF
```

```
Outcome.SHOW
```

```
Out3d.KEEP
```

```
SIGNAL
```

```
Outcome := 0
```

```
Out3d.KEEP
```

```
Ntot.KEEP; NFull.KEEP; NProd.KEEP; NUnprod.KEEP; NProxy.KEEP
```

```
{
```

```
Ntot.SHOW; NFull.SHOW; NProd.SHOW; NUnprod.SHOW; NProxy.SHOW; NFFULL.SHOW
```

```
}
```

```
IF (Choice = Admin) OR (VChoice = Admin) THEN
```

```
{W10DR: ...}
```

```
IF (HHNo > 1) THEN
```

```
SplitHH
```

```
ENDIF
```

```
{... W10DR:}
```

```
{IF (Eligible <> EMPTY) OR (NoInts <> EMPTY) OR (HStatus = Exit) THEN}
```

```
QIOut {individual outcomes etc table}
```

```
SIGNAL
```

```
{W10DR: ...}
```



```
AnyCMNot78 := 0
AnyCMNot95 := 0
FOR idx := 1 TO 16 DO
IF (ff_P[idx].ELSA = Yes OR ff_P[idx].Partner = Yes) AND (QIOut.P[idx].IndOutC = RESPONSE) THEN
IF (QIOut.P[idx].IndOutC <> c78) THEN
AnyCMNot78 := 1
ELSEIF (QIOut.P[idx].IndOutC <> c95) THEN
AnyCMNot95 := 1
ENDIF
ENDIF
ENDDO
{... W10DR:}
```

```
{All in person}
IF (NFull >= 1 AND NFull >= NTot) THEN
Out3d:= c110
Out3d.ASK
Outcome := 110
{All in person or by proxy}
ELSEIF (NProd >= 1) AND ((NFull + NProxy) >= NTot) THEN
Out3d:= c120
Out3d.ASK
Outcome := 120
{Not all in person or by proxy}
ELSEIF NProd >= 1 AND NUnProd >= 1 THEN
Out3d:= c210
Out3d.ASK
Outcome := 210
ELSEIF Eligible <> EMPTY AND Nunprod >= 1 AND Nunprod >= Ntot THEN
Out3d:= c440
Out3d.ASK
Outcome := 440
ELSEIF (NDead >= 1 AND NDead >= NAITot) THEN
Out3d:= c781
Out3d.ASK
Outcome := 781
ELSE
Out3d.ASK
CHECK
NOT(Out3d IN [c110,c120,c210,c440])
"INTERVIEWER: This outcome is only valid for partial
or full interviews.
Please change."
IF (Out3d IN [c570,c614]) THEN
CHECK
(1=1)(ff_Refresh <> Yes)
"This outcome is not valid for the refreshment
sample, use 710 instead."
ENDIF
SIGNAL
(Out3d <> c590)
"INTERVIEWER: Please use this outcome only if none
of the other outcome codes apply."
{W10DR: ...}
SIGNAL
(Out3d = c613) AND (VAPI<>1)
"INTERVIEWER: Are you sure none of the people in
this household can be traced? If new address too
far for you to cover, use code 615."
IF (Out3d = c780) THEN
```

```

SIGNAL
(AnyCMNot78 = 0)
"INTERVIEWER: This code should only be used if
ALL ELSA core members have moved abroad. If
there are core members still in this household
code 590 and individual outcome 78 for the
movers abroad"
ENDIF
IF (Out3d = c781) THEN
SIGNAL
(AnyCMNot95 = 0)
"INTERVIEWER: This code should only be used if
ALL ELSA core members have died. If there are
core members still in this household code 590
and individual outcome 95 or anyone who has died"
ENDIF
SIGNAL
(Out3d <> c790)
"INTERVIEWER: Please check your coding. Outcome
790 should only be used in extremely rare cases
confirmed with the office.
If mentally/physically incapable for interview
- code 530.
If all core members died - code 781.
If cannot find their new address - code 613/614.
If all core members moved abroad - code 780.
If some other reason why this case should not be
issued again - code 590 and leave a note in SAAdinf"

{... W10DR:}
Outcome := ORD(Out3d)
{W10DR: ...
IF (Out3d IN [c310,c410,c510..c590,c612,c614,c620,c630,c790]) THEN
AHHUnprod
ENDIF
... W10DR:}
ENDIF
IF (Out3d IN [c430,c440]) THEN
Outcome := ORD(Out3d)
AWhyRef
SIGNAL
IF (AWhyRef = RESPONSE) THEN
NOT(Other IN AWhyRef)
"INTERVIEWER: Please check that the respondent's reason for
refusal is not one of the answer categories listed."
ENDIF
IF (Other IN AWhyRef) THEN
AWhyRX
ENDIF
ENDIF
IF (Out3d IN [c430..c590]) THEN
NoRevisit
IF (None IN NoRevisit) THEN
CARDINAL(NoRevisit)=1
"'None of these' is an exclusive code. Please change."
ENDIF
ENDIF
{W10}
IF (Out3d IN [c616]) THEN
{W10V7: ...} {WAVEUPDATE - something that will need updating for each wave}

```

{For refreshment sample from Tranches 1-4, 616 can no longer be applied to these cases after the launch of Tranche 5 (Deadline is Sunday 13th January 2019)}

IF (ff\_Refresh = Yes) THEN

CHECK

(Wave <> 'TR1' AND Wave <> 'TR2' AND Wave <> 'TR3' AND Wave <> 'TR4')

"INTERVIEWER: Outcome 616 cannot be selected for [^Wave] refreshment sample cases after Sunday 13th January 2019"

ENDIF

{Outcome 616 can no longer be applied Sunday 10th February 2019}

CHECK

(SYSDATE < TODATE(2019,2,11))

"INTERVIEWER: Outcome 616 cannot be selected after Sunday 10th February 2019"

{... W10V7:}

WhenR

CHECK

IF WhenR=response then

WhenR <> AfterFW

"Wave 9 fieldwork ends in June 2019, if not available until after then change outcome to 590 Other unproductive"{WAVEUPDATE - something that will need updating for each wave}

ENDIF

SIGNAL

IF WhenR=other then

WhenRo

ENDIF

ENDIF

{W7Main: ...}

IF (Out3d IN [c110,c120,c210,c440]) THEN

FfwFdBk

IF (FfwFdBk = Yes) THEN

FfwDesc

{W10DR: ...

FfwInstr

... W10DR:}

ENDIF

ENDIF

{... W7Main:}

QTrace

IF (QTrace.Move = Yes) THEN

AddrConf

{W10DR: ...}

IF (Out3d IN [c110,c120,c210,c440]) "" THEN

CHECK

AddrConf = Yes

"INTERVIEWER: This is a productive household. You must code 1 Yes and provide the latest address where the household was interviewed."

ENDIF

SIGNAL

IF (QTrace.Addup = Yes) "" THEN

AddrConf = Yes

"INTERVIEWER: You have coded that the office has given you a new address for this Household. Please code 1 Yes and record the latest known address details here."

ENDIF

```
IF (QTrace.TelResp = Cont)
OR (QTrace.CurOcc = Cont)
OR (QTrace.StabCon = Cont)
OR (QTrace.Neigh = Cont)
OR (QTrace.ElecReg = Yes)
OR (QTrace.EstAg = Yes)
OR (QTrace.OthAd = Yes)
OR (QTrace.ProxCon = Cont)
THEN
```

```
SIGNAL
```

```
(AddrConf = Yes)
```

```
"INTERVIEWER: You have coded that you found a new address
during tracing. Please code 1 Yes and record the latest
details here if you have found a new complete address."
```

```
ENDIF
```

```
IF (Out3d IN [c310, c520..c590, c612, c615..c630, c790]) "" THEN
```

```
AddrConf = Yes
```

```
"INTERVIEWER: You have coded that this household is untraced. Please go back and enter Household
Outcome code 613 or 614."
```

```
ENDIF
```

```
{... W10DR:}
```

```
IF (AddrConf=Yes) THEN
```

```
MovAdd1
```

```
MovAdd2
```

```
IF (MovAdd2<>EMPTY) THEN
```

```
MovAdd3
```

```
IF (MovAdd3<>EMPTY) THEN
```

```
MovAdd4
```

```
ENDIF
```

```
ENDIF
```

```
MovAddPC
```

```
Postcode(MovAddPC,MovAddPC)
```

```
ConAdd
```

```
IF (MovAdd1 <> EMPTY) THEN
```

```
CHECK
```

```
(ConAdd = Correct) INVOLVING(MovAdd1)
```

```
"INTERVIEWER: Press <Enter> to change the address."
```

```
ENDIF
```

```
ENDIF
```

```
ENDIF
```

```
{W10DR: ...}
```

```
HHAdd1.KEEP
```

```
HHAdd2.KEEP
```

```
HHAdd3.KEEP
```

```
HHAdd4.KEEP
```

```
HHAddPC.KEEP
```

```
IF (ConAdd = Correct) THEN
```

```
HHAdd1 := MovAdd1
```

```
HHAdd2 := MovAdd2
```

```
HHAdd3 := MovAdd3
```

```
HHAdd4 := MovAdd4
```

```
HHAddPC := MovAddPC
```

```
ELSEIF (QTrace.Move = Yes) THEN
```

```
IF HHAdd1 = EMPTY THEN
```

```
HHAdd1 := ff_HHAdd1
```

```
HHAdd2 := ff_HHAdd2
HHAdd3 := ff_HHAdd3
HHAdd4 := ff_HHAdd4
HHAddPC := ff_HHAddPC
ENDIF
ENDIF
```

```
IF (QTrace.Move = No) THEN
```

```
  ChkHHAdd
```

```
  IF (ChkHHAdd = Correct) THEN
```

```
    HHAdd1 := ff_HHAdd1
    HHAdd2 := ff_HHAdd2
    HHAdd3 := ff_HHAdd3
    HHAdd4 := ff_HHAdd4
    HHAddPC := ff_HHAddPC
    HHAdd1.SHOW
    HHAdd2.SHOW
    HHAdd3.SHOW
    HHAdd4.SHOW
    HHAddPC.SHOW
```

```
  ELSEIF (ChkHHAdd = Amend) THEN
```

```
    IF HHAdd1 = EMPTY THEN
```

```
      HHAdd1 := ff_HHAdd1
      HHAdd2 := ff_HHAdd2
      HHAdd3 := ff_HHAdd3
      HHAdd4 := ff_HHAdd4
      HHAddPC := ff_HHAddPC
    ENDIF
```

```
    HHAdd1.ASK
    HHAdd2.ASK
    HHAdd3.ASK
    HHAdd4.ASK
    HHAddPC.ASK
  ENDIF
```

```
ENDIF {(QTrace.Move = No)}
```

```
{W10DR: ...}
```

```
FOR nloop:= 1 TO 16 DO
```

```
  IF (HHNo = 1) AND (Out3D IN [c310..c790]) AND (ff_[nloop]PossMover = Yes) THEN
```

```
    IF (DMName[nloop] = RESPONSE) THEN
```

```
      AName:= DMName[nloop]
```

```
    ELSE
```

```
      AName:= ff_P[nloop].DhNNF
```

```
    ENDIF
```

```
    Split[nloop](nloop,AName)
```

```
  ENDIF
```

```
ENDDO
```

```
{... W10DR:}
```

```
RESERVECHECK
```

```
RESERVECHECK
```

```
FOR nloop:= 1 TO 16 DO
```

```
  IF (QIOut.P[nloop].IndOutC IN [c21,c23,c31..c78,c95]) OR (QHD.QAHD.P[nloop].DhDiedC = Yes) THEN
```

```
    QNames[nloop](nloop)
```

```
  SIGNAL
```

```
  IF QNames[nloop].StSNo = RESPONSE THEN
```

```
tmpint:= ORD(qnames[nloop].stsno)
(QNames[tmpint].QContact.StNam = RESPONSE)
"INTERVIEWER: You have not entered a Stable Contact
for Person [^tmpint]. Please change."
ENDIF
```

```
{W10main:ELSEIF(QIOut.P[nloop].IndOutC IN [c11,c13,c24,c25]) THEN
QNames[nloop].KEEP(nloop)}
ENDIF
RESERVECHECK
RESERVECHECK
ENDDO
NewAdd.KEEP
NAdd1.KEEP
NAdd2.KEEP
NAdd3.KEEP
NAdd4.KEEP
NaddPc.KEEP
NTel.KEEP
NewDat.KEEP
Connew.KEEP
{W8V8: ...}
AskPhone.KEEP
FOR nloop:= 0 TO 15 DO
rloop := 16 - nloop
IF (QNames[rloop].QContact.Tel1 = RESPONSE) AND (QIOut.P[rloop].IndOutc IN [c11..c59]) THEN
AskPhone := QNames[rloop].QContact.Tel1
ELSEIF (QNames[rloop].QContact.Tel1 = RESPONSE) AND (QIOut.P[rloop].IndOutc IN [c11..c59]) THEN
AskPhone := QNames[rloop].QContact.Tel2
ENDIF
ENDDO
{... W8V8:}
```

```
IF (AskPhone = EMPTY) AND (Out3d IN [c110..c590]) THEN
AskPhone
IF AskPhone=RESPONSE THEN
CHECK
THyph:= 0
FOR T:= 1 TO 15 DO
IF T <= LEN(AskPhone) THEN
TASCII:= ORD(SUBSTRING(AskPhone,T,1))
TASCII IN [32,45,48..57]
INVOLVING(AskPhone)
"Please enter the telephone number using digits only,
except for hyphen (-) or blank."
IF CHAR(TASCII) = '-' THEN
THyph:= THyph + 1
ENDIF
ENDIF
ENDDO
THyph < 2
INVOLVING(AskPhone)
"Only use ONE hyphen (-) in the telephone number."
(SUBSTRING(ASKPhone,1,1) = '0')
"Please include the Standard Code.
The telephone number must start with a zero (0)."
ENDIF
txt50:= ASKPHONE
IF ASKPHONE = DK OR ASKPHONE = RF THEN
txt50:= 'Not obtained'
```

```

ENDIF
ConPhone
CHECK
IF (AskPhone <> EMPTY) THEN
(ConPhone = Correct) INVOLVING(AskPhone)
"INTERVIEWER: Press <Enter> to change the telephone number."
ENDIF
ENDIF
NoNewAdd:=1
FOR idx:=1 TO 4 DO
FOR idy:=1 TO 2 DO
IF (QInd[idx].QContact[idy].NewAdd=Yes) THEN
NoNewAdd:=0
ENDIF
ENDDO
ENDDO

IF (Out3d IN [{c110,c120,c210,}c430..c590]) OR
((Out3d=c210) AND (NoNewAdd=1)) THEN
NewAdd {NOT ASKED FOR PRODS, SO NO NEED TO HIDE IN EDIT}
IF NewAdd = Yes THEN
SIGNAL
ERROR
"INTERVIEWER: Only enter address if the respondent has given you a new and useable address."
NAdd1
NAdd2
NAdd3
IF NAdd3<>EMPTY THEN
NAdd4
ENDIF
NaddPc
IF NAddPC=RESPONSE THEN
PostCode(NaddPc,NaddPc)
ENDIF
NTel
NewDat
CHECK
IF NewDat = RESPONSE AND QInit.IntDat = RESPONSE THEN
NewDat >= QInit.IntDat
"INTERVIEWER: This date is before the Date of Interview
(^QInit.Intdat). Please change!"
ENDIF
SIGNAL

IF NTel = RESPONSE AND NTel <> 'Given' THEN
CHECK
THyph:= 0
FOR T:= 1 TO 15 DO
IF T <= LEN(NTel) THEN
TASCII:= ORD(SUBSTRING(NTel,T,1))
TASCII IN [32,45,48..57]
INVOLVING(NTel)
"Please enter the telephone number using digits only,
except for hyphen (-) or blank."
IF CHAR(TASCII) = '-' THEN
THyph:= THyph + 1
ENDIF
ENDIF
ENDDO
THyph < 2

```

```

INVOLVING(NTel)
"Only use ONE hyphen (-) in the telephone number."
(SUBSTRING(NTel,1,1) = '0')
"Please include the Standard Code.
The telephone number must start with a zero (0)."
ENDIF
txt50:= NTel
IF NTel = DK OR NTel = RF THEN
txt50:= 'Not obtained'
ENDIF
Connew
IF (nAdd1 <> EMPTY) "" THEN
CHECK
(ConNew = Correct) INVOLVING(nAdd1)
"INTERVIEWER: Press <Enter> to change the address."
ENDIF
ENDIF
ENDIF
IF NOT(Outcome IN [410,612..920]) THEN
SASRF
ENDIF

IF (QInd[1].QContact[1].FQNurse = Yes)
OR (QInd[1].QContact[2].FQNurse = Yes)
OR (QInd[2].QContact[1].FQNurse = Yes)
OR (QInd[2].QContact[2].FQNurse = Yes)
OR (QInd[3].QContact[1].FQNurse = Yes)
OR (QInd[3].QContact[2].FQNurse = Yes)
OR (QInd[4].QContact[1].FQNurse = Yes)
OR (QInd[4].QContact[2].FQNurse = Yes)
THEN
ANurinf1
ANurinf2
ENDIF
IF Out3d in [c310,c410,c510..c590,c612,c614,c620,c630,c790] THEN
WhyCodeTxt := 'Please enter information to explain why you have coded this household as '+
str(out3d.ord)
ELSE
WhyCodetxt := "
ENDIF
SAADInf

{W10DR: ...}
SIGNAL
IF Out3d = c612 "" THEN
LEN(SAADInf) > 4
"INTERVIEWER: Please explain fully why you have given case a 612 outcome and who you have spoken
with about the case"
ENDIF
{... W10DR:}

{W10Main: not edited ...
IF (SAADinf <> EMPTY) AND (EditQre = Yes) THEN
SAADinfZ
IF (SAADinfZ <> RESPONSE) THEN
EditDo:= Yes
ENDIF
ENDIF
... W10Main:}

```



RESERVECHECK  
RESERVECHECK

Zero[1] := '01'  
Zero[2] := '02'  
Zero[3] := '03'  
Zero[4] := '04'  
Zero[5] := '05'  
Zero[6] := '06'  
Zero[7] := '07'  
Zero[8] := '08'  
Zero[9] := '09'  
Zero[10] := '10'  
Zero[11] := '11'  
Zero[12] := '12'  
Zero[13] := '13'  
Zero[14] := '14'  
Zero[15] := '15'  
Zero[16] := '16'

IF Out3d IN [c110..c210] THEN  
BestT  
BestD  
{BestI}  
ENDIF

{W10DR: ...  
IF ((QTrace.NumTrace > 1) OR (HHNo > 1) OR (Outcome = 410)) THEN  
SABarr  
IF (SABarr = RESPONSE) THEN  
IF (LockEnt IN SABarr) THEN  
SAEnt:= Yes  
ELSE  
SAEnt:= No  
ENDIF  
IF (LockGat IN SABarr) THEN  
SALGat:= Yes  
ELSE  
SALGat:= No  
ENDIF  
IF (Gatek IN SABarr) THEN  
SAGatek:= Yes  
ELSE  
SAGatek:= No  
ENDIF  
IF (EntryP IN SABarr) THEN  
SAEPhon:= Yes  
ELSE  
SAEPhon:= No  
ENDIF  
IF (None IN SABarr) THEN  
CHECK  
(SABarr.CARDINAL = 1)  
"None of these' is an exclusive code for this question."  
SAEnt := No  
SALGat := No  
SAGatek:= No  
SAEPhon:= No  
ENDIF  
SAEnt.SHOW

```
SALGat.SHOW
SAGatek.SHOW
SAEPhon.SHOW
ENDIF
SADType
IF ((QTrace.NumTrace > 1) OR (HHNo > 1)) THEN
Area
CondDU
ENDIF
ENDIF
... W10DR:}
```

```
{W10DR: ...}
IF (Out3D = c410) THEN
AnyVisit
ENDIF
{... W10DR:}
```

```
IF (Out3d IN [c110..c210]) THEN
SASupFlg
ENDIF
```

```
QStdAdmin.KEEP
IF (EditQre <> Yes) THEN
idy := 1
FOR idx:= 1 TO 16 DO
IF (QIOut.p[idx].Indoutc = RESPONSE) AND (idy <= 4) THEN
QStdAdmin.QPeople.QP[idy].SARNFor:= DMName[idx]
IF (QIOut.p[idx].Indoutc IN [c11..c25]) THEN
QStdAdmin.QPeople.QP[idy].SARInt:= Yes
ELSE
QStdAdmin.QPeople.QP[idy].SARInt:= No
ENDIF
idy := idy + 1
ENDIF
ENDDO
QStdAdmin.SANResp := NProd
QStdAdmin.SANNResp := NUnProd
IF (QHD.DhResp IN [1..16]) THEN
QStdAdmin.SACNFor := DMName[QHD.DhResp]
ENDIF
QStdAdmin
ENDIF
```

```
IF (Out3d = RESPONSE) THEN
```

```
{#1. Unproductive (household level)}
IF (Out3d IN [c310,
c430, c440, c450,
c510, c520, c530, c540, c570, c590,
c613, c614, c615, c620, c630,
c710, c780, c781, c790])
OR (Out3d = c410 AND AnyVisit = Yes) THEN
Fee[1] := 1
ENDIF
```

```
{#6. Reissue conversion bonus}
Fee[6] := NFFull + NFpp
```

```
{#10. 1st Person in household interview}
```

```

IF (NFFull >= 1) THEN
Fee[10] := 1
IF (NFFull > 1) THEN
{#11. Additional person in household}
Fee[11] := NFFull - 1
ENDIF
ENDIF

{#12. Partial or proxy individual interview}
IF (NFpp >= 1) THEN
Fee[12] := NFpp
ENDIF

{#13. Add-on for refreshment sample}
IF (ff_Refresh = Yes) THEN
Fee[13] := NFFull + NFpp
ENDIF

ENDIF {(Out3d = RESPONSE)}

XX1.KEEP
IntDone
IF (IntDone = Yes) THEN
CHECK
(Out3d=RESPONSE)
"INTERVIEWER: You haven't completed the outcome coding.
Please do so, or amend IntDone to '2' for 'Not yet'."
FOR idx:=1 TO 4 DO
IF (QInd[idx].Endiint=Cont) THEN
IF ((QInd[idx].Session[1] = Yes) AND (QInd[idx].IAskPx[1] <> Yes) AND (QInd[idx].IAgeOf[1] >= 60)) OR
((QInd[idx].Session[2] = Yes) AND (QInd[idx].IAskPx[2] <> Yes) AND (QInd[idx].IAgeOf[2] >= 60)) THEN
MMDone[idx]=Yes
"You still need to complete the Measurements questionnaire"
ENDIF
ENDIF
ENDDO
ENDIF

XX2.KEEP
IF Editqre <> Yes THEN {EDIT}
Info
ELSE
EdDone
IF EdDone = RESPONSE "" THEN
EdDoneV := EdDone.ORD
ENDIF
EdInfo{.KEEP}
ENDIF

ENDIF

RESERVECHECK
RESERVECHECK
RESERVECHECK
RESERVECHECK

LAYOUT {BAdmin}

{ Tablet

```

```
AT Out3d INFOPANE TopInfoPaneLongQT
AT ConNew INFOPANE TopInfoPaneLongQT
AT AddrConf INFOPANE TopInfopaneLarge
AT AddrConf GRID LargeGrid
}
BEFORE AddrConf NEWPAGE
BEFORE NewAdd NEWPAGE
  { BEFORE HStatusNEWPAGE }
BEFORE QStdAdmin NEWPAGE

ENDBLOCK {BAdmin}
```