

NICOLA CAPI Questionnaire

Version 1.18 (IM)

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EXPLANATORY NOTE ON THE USE OF CAPI

The NICOLA field questionnaire will use CAPI, or Computer Assisted Personal Interviewing. Instead of collecting data using pen and paper questionnaires, interviewers will use portable computers to enter data directly via a keyboard. While the paper version that has been submitted to the ethics committee may appear cumbersome, the conversion of the questions into an electronic format will make the questions much easier and quicker to administer. Advantages of CAPI include:

- routing problems within the questionnaire are eliminated
- interviewers cannot miss questions or ask the wrong questions
- questions are 'customised' correctly
- mathematical calculations can be carried out within the program
- the computer checks for inadmissible or inconsistent responses
- errors from separate data entry are eliminated.

CAPI handles routing by taking interviewers automatically to the next appropriate question avoiding the interviewer having to interpret complex routing instructions. In addition, if a set of questions has to be asked a number of times (for example, for every type of heart disease), the computer will automatically repeat the questions (go round the 'loop') the correct number of times and then move on. CAPI's routing capabilities have two main advantages over paper and pencil techniques. First, the possibility of error from interviewers failing to follow routing instructions is eliminated; they cannot follow a wrong route and ask inappropriate questions nor can they inadvertently skip over questions. Secondly, the interview flows much more smoothly since the interviewer does not have to keep referring to earlier answers to establish the correct route through the questions.

Interviewing is also made easier by the 'customising' of questions. The computer program will be able to recall a piece of data from its memory, such as a name or a date and insert it in the appropriate place in a question. For example, questions such as: "How often do/does (you/NAME) give (TYPE OF HELP)?" Using CAPI interviewers would not have to keep a check on which member of the household and which type of help they are asking about. Instead they would be faced with a series of questions like "How often does Mary help with the shopping?" In this way the accuracy of the question and the smoothness of the interview are both improved.

On the door step:

DSQ1 – Did you get a letter about the NICOLA study?

- 1.Yes
- 2.No

Inside door script:

IDSQ1: Before we start chatting about NICOLA, how interested or enthusiastic are you in joining this study? Please answer on a scale of 1 and 5, with 1 being not enthusiastic or interested at all and 5 being extremely interested or enthusiastic in taking part.

- 1- Not enthusiastic at all
- 2- Somewhat enthusiastic
- 3- Undecided
- 4- Very enthusiastic
- 5- Extremely enthusiastic

IDSQ2 Have you heard of NICOLA before now?

- 1.Yes
- 2.No
- 3.DK

If (IDSQ2 = 1 "Yes") then ask

IDSQ2B. Where did you hear about it? MULTICODE

- 1 Invite letter
- 2 Radio
- 3 TV
- 4 Newspaper
- 5 Road Show
- 6 Twitter
- 7 Facebook
8. Internet
9. Other (with free text box)

IF (DSQ1 = 1 OR IDSQ2B(Invite letter) = 1) ASK IDSQ3 and IDSQ4

IDSQ3 Did you keep the invite letter?

- 1.Yes
- 2.No
- 3.Didn't receive one
- 4.Don't know

IDSQ4 Did the fact that the letter was from QUB make a difference in your interest in joining the study?

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

ALLOCATION OF MODULES TO RESPONDENTS

Module Code	Module Name	All respondents	Financial respondents	Family respondents	First hh interview
1.CS	Cover screen-h				X
1.CSi	Cover screen-i	X			
2.DM	Demographics	X			
3.TC	Transfers to children			X	
5.PH	Physical & cognitive health	X			
6.FL	I(ADL) & helpers	X			
8.WE	Employment situation	X			
9.HU	Healthcare utilisation	X			
10.HB	Health behaviour	X			
11.MD	Medications	X			
14.WP	Work and pensions	X			
15.CN	Social connectedness	X			
16.IA	Income and assets module	X	X		
17.EX	Expectations	X			
18.SP	Social participation	X			
19.SC	Social capital	X			

CM001. First, I would like to ask, are there any persons aged 50 or over living in this household?

1. Yes
2. No

BL:IF CM001=2 (NO) end the interview

NOTE: a household consists of all persons - who live in the same dwelling (using the same entrance door) and- who have a common housekeeping budget or usually have their meals together. Exceptions: lodgers (persons who sublet) are not considered members of the household, even though they may occasionally have dinner with the host

SECTION 1: COVER SCREEN-H (HOUSEHOLD – ONLY ASKED ONCE)

NOTE: Person giving details about the householders is a potential respondent i.e. aged 50 or over or married/living as married with someone aged 50 or over

CS027:

IS THIS DWELLING LOCATED

1. IN BELFAST CITY
2. A CITY OR TOWN IN THE NORTHERN IRELAND OTHER THAN BELFAST
3. IN A RURAL PART OF THE NORTHERN IRELAND

CF001x: Has the respondent signed the consent form?

1. Yes (GO TO CF001bx)
2. No (Ask respondent to sign consent form and tick „Yes“)

CF001bx:

INTERVIEWER READ OUT

As I explained earlier this is a longitudinal study which means that people who take part will be visited once every two years. Are you willing to be re-contacted to participate in a similar interview in the next 2 years? Again at this stage your participation will be voluntary.

NOTE:

If respondent says no, you should make every effort to persuade the respondent of the importance of the study and the benefits to people living in Northern Ireland.

Also attempt to understand reasons for not wanting to be re-contacted and address these i.e. give assurances on confidentiality and anonymity.

If respondent still says that they do not wish to be re-contacted code 'NO' but you may continue with this interview.

1. Yes
2. No

CS INTRO: This study is interested in learning about the health, life style, financial and family situation of people who are age 50 and over. This interview is completely voluntary and confidential. If we should come to any question you don't want to answer, just let me know and I will go on to the next question. The answers that you give will be kept confidential and will be used only for research purposes

1. Continue

CM002: In order to determine who is eligible to be interviewed, I need to ask a few questions about each household member, like name, sex, and date of birth. Let's start with you.

1. Continue

CS001: What name would you like to be referred to during the interview?

Text: up to 60 characters

First, I'd like to ask a few questions to make sure that you are eligible for this study.

CS002Y: In what year were you born?

YEAR: _____

DK

RF

CS002M: And in what month were you born?

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

DK

RF

IF (CS002Y = DK/RF) ASK CM003

CM003: For the purposes of this research can you tell me if you are aged

- | | | | |
|---|----------|----|------------|
| 2 | 16 to 24 | 8 | 65 to 69 |
| 3 | 25 to 49 | 9 | 70 to 74 |
| 4 | 50 to 54 | 10 | 75 to 79 |
| 5 | 55 to 59 | 11 | 80 to 84 |
| 6 | 60 to 61 | 12 | 85 to 89 |
| 7 | 62 to 64 | 13 | 90 or over |

CODE WITHOUT ASKING

CS004: Is Respondent male or female?

1. MALE

2. FEMALE

CM004: Are you...

1. Living with a spouse
2. Living with a partner
3. Living as a single person (including widows, separated etc.)

IF (CM004 = 1 OR 2 [LIVING WITH SPOUSE/PARTNER]) ASK CS007.

IF CM004 = 3 [SINGLE] GO TO CM007

CS007: What is [your] [wife/husband/partner]'s first name?

CS010: note sex of [wife/husband/partner] of respondent (ASK IF UNSURE)

1. Male

2. Female

CM005: How old is your {{wife/husband/partner}}?

98 DK

99 RF

BL: IF CM005=98 OR 99 THEN GO CM006, OTHERWISE GO TO CM007

CM006: Is your [husband/wife/partner] aged...?

1	16 to 24	7	65 to 69
2	25 to 49	8	70 to 74
3	50 to 54	9	75 to 79
4	55 to 59	10	80 to 84
5	60 to 61	11	85 to 89
6	62 to 64	12	90 or over

CM007: Excluding yourself [and your [husband/wife/partner]], does anyone else live in this household?

1. Yes
2. No

NOTE: A household consists of all persons - who live in the same dwelling (using the same entrance door) and- who have a common housekeeping budget or usually have their meals together. Exceptions: lodgers (persons who sublet) are not considered members of the household, even though they may occasionally have dinner with the host. Children living together with their parents at the parents' address, or parents living together with their children at the children's address **will be considered members of the household** whether or not they have a common housekeeping budgets for meals.

IF (CM007 = 1) ASK CM008 – LOOP CM008 TO CM019

CM008: What is his or her first name?

CM009: What is the sex of [{first name household member}]?

1. Male
2. Female

CM011: How old is [{first name household member}]?

98 DK
99 RF

IF (CM001 = 98 / 99) ASK CM012

CM012: Is [{first name household member}] aged...?

1	Under 16	8	65 to 69
2	16 to 24	9	70 to 74
3	25 to 49	10	75 to 79
4	50 to 54	11	80 to 84
5	55 to 59	12	85 to 89
6	60 to 61	13	90 or over
7	62 to 64		

CM010: What is [your] relationship to [first name household member]?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
7. Father-in-law	6. Mother-in-law
26. Stepfather	27. Stepmother
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Other non-relative	25. Other non-relative

CM013: Is [{first name household member}] living with a spouse, with a partner, or as a single?

1. Living with a spouse
2. Living with a partner
3. Living as a single person (including widows, separated etc.)

IF (CM013=3 (Living as a single)) GO TO CM019

CM014: What is his or her first name?

CM015: What is the sex of [{first name household member's husband/wife/partner}]?

1. Male
2. Female

CM017: How old is [{first name household member's husband/wife/partner}]?

98 DK

99 RF

CM018: Is [{first name household member's husband/wife/partner}] aged...

1	Under 16	8	65 to 69
2	16 to 24	9	70 to 74
3	25 to 49	10	75 to 79
4	50 to 54	11	80 to 84
5	55 to 59	12	85 to 89
6	60 to 61	13	90 or over
7	62 to 64		

CM016: What is [your] relationship to [{first name household member's husband/wife/partner}]?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
7. Father-in-law	6. Mother-in-law
26. Stepfather	27. Stepmother
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Other non-relative	25. Other non-relative

CM019X: NOT ASKED

1. Person listed at CM008 eligible for interview
[(CM011 >= 50 OR CM012 >= 4) AND CM013 = 3]
2. Persons listed at CM008 and CM014 eligible for interview
[((CM011 >= 50 OR CM012 >= 4) AND CM013 < 3) OR (CM013 < 3 AND (CM017 >= 50 OR CM018 >= 4))]
3. No one in this loop is eligible for interview

CM019: Does anyone else live in this household?

1. Yes
2. No

IF (CM019 = 1) LOOP BACK TO CM008

CM020: Let me just check. That makes [{number of people in household}] people living in this household altogether? Is that correct?

1. Yes
2. No [GO BACK TO CM007]

CM021: Have we left anyone out?

1. Yes CHECK: Please go back and add this person.
2. No CONTINUE

SUBSEQUENT INTERVIEWS IN THE SAME HOUSEHOLD START HERE**SECTION 1.1: COVER SCREEN-R (INDIVIDUAL INTERVIEW)**

CF001: Has the respondent signed the consent form?

1. Yes (GO TO CF001b)
2. No

CF001b:

As I explained earlier this is a longitudinal study which means that people who take part will be visited once every two years. Are you willing to be re-contacted to participate in a similar interview in the next 2 years? Again at this stage your participation will be voluntary.

NOTE:

If respondent says no, you should make every effort to persuade the respondent of the importance of the study and the benefits to people living in Northern Ireland.

Also attempt to understand reasons for not wanting to be re-contacted and address these i.e. give assurances on confidentiality and anonymity.

If respondent still says that they do not wish to be re-contacted code 'NO' but you may continue with this interview.

Yes

No

CF002 known from CM004 or CM013

CF002: Does the respondent have a spouse/partner living with him/her?

1. Yes (GO TO CF003)
2. No (GO TO CS017 and code as 3)

CF003: Are both willing to participate in the survey?

1. Yes
2. No (CAPI: treat as a single person; GO TO CS017)

CF004: If present, has the second respondent signed the consent form?

1. Yes
2. Not yet. Second respondent not present.

CS015: Later in this interview, I will be asking questions about your family finances and retirement planning. Which of you is the most knowledgeable about this, you or your (husband/wife/partner)?

1. Respondent
2. Spouse/partner

CS016: Which of you is the most knowledgeable about family matters, you or your (husband/wife/partner)?

NOTE: By this we mean knowledge about family situation i.e. information about your children and grandchildren.

1. Respondent
2. Spouse/partner

CS017 – NOT ASKED. DERIVED FROM CS015 AND CS016

IF (CS015 = 1 AND CS016 = 2) SET CS017 = 1

IF (CS015 = 2 AND CS016 = 1) SET CS017 = 2

IF (CS015 = 1 AND CS016 = 1) SET CS017 = 3

IF (CS015 = 2 AND CS016 = 2) SET CS017 = 4

CS017: Please classify this respondent as one of the following:

1. FINANCIAL R
2. FAMILY R
3. FINANCIAL AND FAMILY R
4. NEITHER

Financial R: The financial R answers questions on housing, income, and assets.

Family R: The family R answers questions on children and grandchildren

SECTION 2: DEMOGRAPHICS (DM)

I would like to begin by asking some questions about your background.

GD001 TO DN003B – FILLED WITH DATA FROM HOUSEHOLD GRID

GD001: Respondent's NAME

GD002: Is this respondent male or female?

1. Male
2. Female

DN002: In which month were you born? MONTH

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

DN003: In which year were you born? YEAR (ex: 1955)

DN003b: For the purposes of this research can you tell me if you are aged...

2	16 to 24	8	65 to 69
3	25 to 49	9	70 to 74
4	50 to 54	10	75 to 79
5	55 to 59	11	80 to 84
6	60 to 61	12	85 to 89
7	62 to 64	13	90 or over

DME004 What is your ethnic group? **SHOW CARD DM1**

Tick one box only.

1. White
2. Chinese
3. Irish Traveller
4. Indian
5. Pakistani
6. Bangladeshi
7. Black Caribbean
8. Black African
9. Black Other
10. Mixed ethnic group - free text
11. Any other ethnic group – free text

DNI005: How would you describe your national identity? **MULTI-CODE**

1. British
2. Irish
3. Northern Irish
4. English
5. Scottish
6. Welsh
7. Other & free text
8. RF

DNI005b: What is your country of birth?

1. Northern Ireland
2. England
3. Scotland
4. Wales
5. Republic of Ireland
6. Elsewhere & free text box

CS006: [IF CM013 was asked] Can I just check again, are you ...
[Otherwise] Are you...) **SHOW CARD CS1**

1. Married
2. Living with a partner as if married
3. Single (never married) **GO TO DM001**
4. Separated
5. Divorced
6. Widowed

Note:

Married includes those living temporarily apart due to illness, work, etc...

Living with a partner is a situation where there is no formal marriage but R is living in a marriage-like relationship.

Separated is a situation where R is not living with partner and there is no marriage-like relationship anymore.

IF CS006 = 1, 4, 5 OR 6 ASK

CS011y: In which year did you get married or start living together?

IF CS006 = 2 ASK

CS011y: In which year did you start living together?

(YYYY)

_____ DK RF YEAR

CHECK: Year marriage should be at least 12 years after year of birth of respondent!

DN004: In which year was [your] [ex-/late] [husband/wife/partner] born?

RECORD BIRTH YEAR OF MOST RECENT SPOUSE

(1900...1990)

_____ DK RF YEAR

IF (CS006 = 4, 5, 6) ASK DN005

DN005 HIGHEST EDUCATIONAL DEGREE OF FORMER SPOUSE

What is the highest school certificate or degree that [your] [ex-/late] [husband/wife]
[has/had] obtained? **SHOW CARD DM2**

1. Some primary (not complete)
2. Primary or equivalent
3. GCSE/Intermediate/junior/group certificate or equivalent
4. A-level/Leaving certificate or equivalent
5. Diploma/certificate
6. Primary degree
7. Postgraduate/higher degree
96. None
98. DK
99. RF

IF (CS006 = 6) ASK CS012

CS012: In which year did you become a widow/widower?
(YYYY)

_____ DK RF YEAR

IF (CS006 = 4, 5) ASK CS013

CS013: In which year did you stop living together/get divorced? (MM/YYYY)
(YYYY)

_____ DK RF YEAR

IF (CS006 = 1, 2, 4 or 5 and CM004 = 3) ASK CS014

CS014: Is your (ex) (husband/wife/partner) living in a nursing home, hospital or other health care institution?

1. Yes

2. No

98. DK

99. RF

Note: Living means living long term

Schooling

DM001 Now I would like to ask some questions about your background. What is the highest level of education you have completed? **SHOW CARD DM2**

1. Some primary (not complete)

2. Primary or equivalent

3. GCSE/O-level/Intermediate/junior/group certificate or equivalent

4. A-level/Leaving certificate or equivalent

5. Diploma/certificate

6. Undergraduate Primary degree

7. Postgraduate/higher degree

96. None

98. DK

99. RF

Childhood**DM002:** Where was your father brought up?

This is the male who acted in the parental role for most of the respondent's childhood
i.e. biological father, adoptive father, step father etc.

1. In Belfast city
2. A city or town in the Northern Ireland other than Belfast
3. In a rural part of Northern Ireland
4. In the Republic of Ireland
5. Another country

98. DK

99. RF

DM003: Where was your mother brought up?

This is the female who acted in the parental role for most of the respondent's childhood
i.e. biological mother, adoptive mother, step mother etc.

1. In Belfast city
2. A city or town in the Northern Ireland other than Belfast
3. In a rural part of Northern Ireland
4. In the Republic of Ireland
5. Another country

98. DK

99. RF

DM003a: What age was your mother when you were born?

12.....80, DK

DM003b: What age was your father when you were born?

12.....80, DK

DM004: Were you living in a rural area when you were about age 14?

1. Yes

2. No

98. DK

99. RF

DM005: Consider your health while you were growing up, from birth to age 14. Would you say that your health during that time was excellent, very good, good, fair, or poor?

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor

98. DK

99. RF

DM006: Now think about your family when you were growing up, from birth to age 14. Would you say your family during that time was pretty well off financially, about average, or poor?

1. Pretty well off financially
2. About average
3. Poor
98. DK
99. RF

DM007A: While you were growing up, before age 14, did your mother ever work outside the home? **(Farm work is to be regarded as work outside the home).**

1. Yes **GO TO DM007B**
2. No **GO TO DM008A**
98. DK **GO TO DM008A**
99. RF **GO TO DM008A**

DM007B: What was your mother's occupation when you were age 14?

If mother had two professions ask the following questions about the most important job, i.e. one with highest pay

Text: Up to 60 characters

98. DK
99. RF

DM008A: While you were growing up, before age 14, did your father ever work outside the home? **(Farm work is to be regarded as work outside the home).**

1. Yes **GO TO DM008B**
2. No **GO TO DM009**
98. DK **GO TO DM009**
99. RF **GO TO DM009**

DM008B: What was your father's occupation when you were age 14?

If father had two professions ask the following questions about the most important job, i.e. one with highest pay

Text: Up to 60 characters

98. DK
99. RF

DM008x: Did you share a bedroom with a sibling or other family member when you were a child? IF YES, was that for the majority of your childhood, some of your childhood or just for a brief period?

1. No I did not share a bedroom
2. Yes, I shared a bedroom for the majority of my childhood
3. Yes, I shared a bedroom for some of my childhood
4. Yes, I shared a bedroom for a brief period in my childhood.
98. DK
99. RF

DM043:

HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION DM?

1. NEVER
2. A FEW TIMES
3. MOST OR ALL TIMES

SECTION 3: TRANSFERS TO CHILDREN (TC)**ASK THIS SECTION IF RESPONDENT IS FAMILY RESPONDENT (CS017=2 or 3)****Non-resident Children**

CS028: Next are some questions about your living children (and those of your husband/wife/partner) who don't live with you in your home. How many living children do you have that do not live with you in your home? Please count all natural children, fostered, adopted and stepchildren, including those of your husband/your wife/your partner.

Range: 0...20

GO TO Section 11b IF CS028 = 0**Non-Financial Assistance Given to Children**

Now I would like to ask about different kinds of help that you provided regularly to your children over the past two years. This refers only to help you provided to children *outside* the household i.e. help provided to co-resident children is to be excluded.

TC014: In the last 2 years, excluding childcare, have you (and/or your spouse/partner) spent at least 1 hour a week helping your adult children and/or grandchildren with things like: **SHOW CARD TC3**

1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores

2) Help with paperwork, such as filling out forms, settling financial or legal matters

1. Yes

2. No **GO TO TC016**

98. DK

99. RF

TC015: About how many hours per month on average did you (and/or your spouse/partner) provide such help to your children?

1 ... 750

98. DK

99. RF

TC016: In the last two years, have you (or your spouse/partner) spent at least 1 hour a week taking care of grandchildren or great-grandchildren (who live outside your own household)?

1. Yes

2. No **GO TO Section 11b**

97. Not applicable GO TO Section 11b

98. DK

99. RF

TC017: About how many hours on average per month did you (and/or your spouse/partner) spend taking care of your grandchildren or great-grandchildren (who live outside your own household)?

1 ... 750

98. DK

99. RF

SECTION 11B – Demographics (Part 2)

QZZ: Were you adopted as a child?

1. Yes
2. No
3. Do not know
4. Prefer not to answer

IF FATHER LIVES IN THE SAME DWELLING AS RESPONDENT SET DM011 = 1

DM011: Is your biological father still alive?

1. Yes
2. No
3. Do not know
4. Prefer not to answer

IF (QZZ = 1) ASK DM012 OTHERS GO TO DM015

DM012: Is your ADOPTED father still alive?

1. Yes
2. No
3. Do not know
4. Prefer not to answer
5. Not applicable – no adopted father

IF FATHER LIVES IN THE SAME DWELLING AS RESPONDENT AND HIS AGE WAS PROVIDED SET DM013a = FATHER'S AGE

DM013a: What is his age now? (biological father)

DM013b: What is his age now? (adopted father)

- 30-120.....
- 98. Do not know
-99. Prefer not to answer

IF (DM011 = 2) ASK DM014a

DM014a: What was his age when he died? (biological father)

IF (DM012 = 2) ASK DM014b

DM014b: What was his age when he died? (adopted father)

-
- 98. Do not know
-99. Prefer not to answer

Answer the following questions for relatives only. If you are unsure that they have suffered from the selected illnesses please select "Do not know". If you know they suffered from certain listed illnesses but are unsure about the others, only select the ones you are sure about.

IF MOTHER LIVES IN THE SAME DWELLING AS RESPONDENT SET DM021n = 1

DM021n: Is your biological mother still alive?

1. Yes
2. No
3. Do not know
4. Prefer not to answer

IF (QZZ = 1) ASK DM022n OTHERS GO TO DM025

DM022n: Is your ADOPTED mother still alive?

1. Yes
2. No
3. Do not know
4. Prefer not to answer
5. Not applicable – no adopted mother

IF MOTHER LIVES IN THE SAME DWELLING AS RESPONDENT AND HER AGE WAS PROVIDED SET DM023na = MOTHER'S AGE

DM023na: What is her age now? (biological mother)

DM023nb: What is her age now? (adopted mother)

- 30-120.....
- 98. Do not know
- 99. Prefer not to answer

IF (DM021n = 2) ASK DM024na

DM024na: What was her age when she died? (biological mother)

IF (DM022n = 2) ASK DM024nb

DM024nb: What was her age when she died? (adopted mother)

-
- 98. Do not know
- 99. Prefer not to answer

DM031: How many brothers do you have? (Please include those who have died, and twin brothers. Do not include half-brothers, step-brothers or adopted brothers)

-
- 98. Do not know
- 99. Prefer not to answer

DM032: How many ADOPTED brothers do you have? (Please include those who have died)

-
- 98. Do not know
- 99. Prefer not to answer

DM033: How many sisters do you have? (Please include those who have died, and twin sisters. Do not include half- sisters, step- sisters or adopted sisters)

-

- 98. Do not know
- 99. Prefer not to answer

DM034: How many ADOPTED sisters do you have? (Please include those who have died)

•

- 98. Do not know
- 99. Prefer not to answer

IF (DM031 > 0 OR DM033 > 0) ASK DM035 OTHERS GO TO DM038)

DM035 Have any of your brothers or sisters ever suffered from? **SHOW CARD DM3**

(You can select more than one answer)

1. Heart disease
2. Stroke
3. High Blood Pressure
4. Diabetes
5. Chronic Bronchitis/emphysema
6. Alzheimer's disease/dementia
7. None of the above
8. Do not know
9. Prefer not to answer

DM036 Have any of your brothers or sisters ever suffered from? **SHOW CARD DM4**

(You can select more than one answer)

1. Parkinson's disease
2. Severe Depression
3. Lung Cancer
4. Bowel Cancer
5. Prostate Cancer
6. None of the above
7. Do not know
8. Prefer not to answer

DM037 Have any of your brothers or sisters ever suffered from any of the following eye diseases? **SHOW CARD DM5**

(You can select more than one answer)

1. Cataract
2. Macular Degeneration
3. Glaucoma
4. Diabetic related Eye Disease
5. None of the above
6. Do not know
7. Prefer not to answer

IF (DM032 > 0 OR DM034 > 0) ASK DM038 OTHERS GO TO DM041)

DM038 Have any of your ADOPTED brothers or sisters ever suffered from?

SHOW CARD DM3

(You can select more than one answer)

1. Heart disease
2. Stroke

3. High Blood Pressure
4. Diabetes
5. Chronic Bronchitis/emphysema
6. Alzheimer's disease/dementia
7. None of the above
8. Do not know
9. Prefer not to answer

DM039 Have any of your adopted brothers or sisters ever suffered from?

SHOW CARD DM4

(You can select more than one answer)

1. Parkinson's disease
2. Severe Depression
3. Lung Cancer
4. Bowel Cancer
5. Prostate Cancer
6. None of the above
7. Do not know
8. Prefer not to answer

DM040 Have any of your ADOPTED brothers or sisters suffered from any of the following eye diseases? **SHOW CARD DM5**

(You can select more than one answer)

1. Cataract
2. Macular Degeneration
3. Glaucoma
4. Diabetic related Eye Disease
5. None of the above
6. Do not know
7. Prefer not to answer

IF (DM031 > 0 OR DM033 > 0) ASK DM041 OTHERS GO TO DM042)

DM041: How many OLDER brothers/sisters do you have?

(Please include those who have died, and twins. Do not include half-, step-, or adopted brothers and sisters)

•

-98. Do not know

-99. Prefer not to answer

DM042: Have any of your mother, father, brothers or sisters died suddenly from a non-accidental cause? (Include any parents, biological/adoptive/other. Do not include half-, step-, or adopted brothers and sisters)

1. Yes
2. No
3. Do not know
4. Prefer not to answer

DM043n: **IWER (CODE WITHOUT ASKING): HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION DM?**

- 1. NEVER**
- 2. A FEW TIMES**
- 3. MOST OR ALL OF THE TIME**

SECTION 5: PHYSICAL & COGNITIVE HEALTH (PH)

Overall health and functional limitations

PH001: Now I would like to ask you some questions about your health.

Would you say your health is...?..

- 1. excellent,
- 2. very good,
- 3. good,
- 4. fair,
- 5. or, poor?
- 98. DK
- 99. RF

PH002: What about your emotional or mental health? Is it ...

- 1. excellent,
- 2. very good,
- 3. good,
- 4. fair,
- 5. or, poor?
- 98. DK
- 99. RF

PH003: Some people suffer from chronic or long-term health problems. By long-term we mean it has troubled you over a period of time or is likely to affect you over a period of time. Do you have any long-term health problems, illness, disability or infirmity?

NOTE: INCLUDING MENTAL HEALTH PROBLEMS

- 1. Yes
- 2. No **GO TO PH006**
- 98. DK **GO TO PH006**
- 99. RF **GO TO PH006**

PH004: Does this illness or disability limit your activities in any way?

- 1. Yes
- 2. No **GO TO PH006**
- 98. DK **GO TO PH006**
- 99. RF **GO TO PH006**

PH005: For the past six months or more, to what extent have you been limited because of a health problem in activities people usually do?

1. Severely limited
2. Limited, but not severely
3. Not limited
98. DK
99. RF

PH006: 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 **GO TO PH008**
98. DK **GO TO PH008**
99. RF **GO TO PH008**

PH007: Is this a health problem or disability that you expect to last less than three months?

1. Yes
2. No
98. DK
99. RF

PH008: In the past year have you lost 10 pounds ($\frac{3}{4}$ stone, 4.5 kg) or more in weight when you weren't trying to, for example, because of illness?

1. Yes
2. No
98. DK
99. RF

PH009: In general, compared to other people your age, would you say your health is...

1. excellent,
2. very good,
3. good,
4. fair,
5. or, poor?
98. DK
99. RF

MH026 *The Brief Resilience Scale: Items*

I am now going to ask you a few statements about how you would describe yourself. Please look at SHOW CARD MH4. In a scale from 1 to 5, where “1”= strongly disagree and “5”= strongly agree please indicate the extent to which you agree with each of the following statements.

1. I tend to bounce back quickly after hard times
2. I have a hard time making it through stressful events
3. It does not take me long to recover from a stressful event
4. It is hard for me to snap back when something bad happens
5. I usually come through difficult times with little trouble
6. I tend to take a long time to get over set-backs in my life

Animals

Pet 1: Do you have any pets?

1. Yes
2. No

IF Pet 1 = yes ASK Pet 2

Pet 2: How many of the following pets do you have:

1. Cats
2. Dogs
3. Rabbits
4. Rodents
5. Birds

Pet 3: Do you have any other pets?"

1. Yes
2. No

GP visits

READ OUT: I would like to ask about your GP attendance.

GP1: During the four weeks ending yesterday, did you talk to a family doctor (GP) about your health either in person or on the telephone?

1. Yes
2. No
98. DK
99. RF

GP2: Thinking of the last time you talked to a doctor; was this consultation...

1. NHS
2. Private
98. DK
99. RF

Memory

INTRO: READ OUT Part of this study is concerned with people's day-to-day memory and their ability to remember events that happened recently – for instance something that happened yesterday or this morning - rather than long ago.

PH114: How would you rate your day-to-day memory at the present time? Would you say it is?

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor
98. DK
99. RF

PH115: How often would you find that you are absent minded, for example forgetting where you put your glasses / keys or finding yourself in a room having forgotten why you came in there? Would you say that you are absent minded in this sort of way?

1. All of the time
2. Most of the time
3. Some of the time
4. None of the time
98. DK
99. RF

INTRO: In the next section of the interview, we will do some memory and concentration tasks. Some of them may seem rather easy but others are more difficult so please listen carefully. Please just do the best you can on all of them.

INTRO: Now I would like you to remember two things in order to assess everyday memory. At some point during the interview I will hand you a piece of paper and a pen.

When I do I would like you to write your initials on the top left hand corner of the piece of paper. Is that clear?

IF RESPONDENT IS NOT CLEAR REPEAT INSTRUCTIONS.

INTRO: READ OUT The second task is for you to remind me to do something. When we finish the memory and concentration tasks I will say "that is the end of the memory and concentration tasks". When I do I would like you to remind me to record what time we finish the tasks. is that clear?

IF RESPONDENT IS NOT CLEAR REPEAT INSTRUCTIONS.

INTRO: For the next task the computer will 'read' a list of words which I will ask you to recall. First I'd like to check that you will be able to hear the computer voice - please listen to this short message.

Press 1 to activate the test message.

If the respondent cannot hear properly, adjust the volume on the laptop, then go back to the previous question and press to play the test message again.

SHOW THE WORD LIST – ANIMAL NAMES PAGE (PAGE 3) AT THE BACK OF THE COGNITIVE MODULE BOOKLET

PH116: 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

BL: IF PH116=1 - GO TO PH117

BL: IF PH116=2 - GO TO PH119

PH117: INTRO: The computer will now read a set of 10 words. We have purposely made the list long so it will be difficult for anyone to recall all the words. Most people recall just a few. Please listen carefully to the set of words, as they cannot be repeated. When it has finished, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

If no explain further. If yes press <enter> to begin test and have booklet ready

BL: ONE RANDOMLY SELECTED LIST GIVEN TO EACH RESPONDENT. 1 WORD EVERY 2 SECONDS

Now please tell me all the words you can recall.

ENTER THE NUMBER OF WORDS THE RESPONDENT CORRECTLY RECALLS. 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.

1.....10 GO TO PH118

98. DK

99. RF

PH118: INTRO: The computer will now read the same set of 10 words out again. When it has finished, I will ask you to recall aloud as many of the words as you can, in any order, including the words you recalled earlier. Is this clear?

After the word list has been read out press<Enter>

Now please tell me all the words you can recall.

ENTER THE NUMBER OF WORDS THE RESPONDENT CORRECTLY RECALLS. 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.

1.....10 GO TO PH121

98. DK

99. RF

PH119: INTRO: Now, I am going to read a list of 10 words from my computer screen. We have purposely made the list long so it will be difficult for anyone to recall all the words. Most people recall just a few. Please listen carefully to the set of words, as they cannot be repeated. When I have finished, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

IF RESPONDENT IS NOT CLEAR REPEAT INSTRUCTIONS.

WAIT UNTIL WORDS APPEAR ON THE SCREEN.

BL: ONE RANDOMLY SELECTED LIST GIVEN TO EACH RESPONDENT

Word List A	Word List B	Word List C	Word List D
Hotel	Sky	Women	Water
River	Ocean	Rock	Church
Tree	Flag	Blood	Doctor
Skin	Dollar	Corner	Palace
Gold	Wife	Shoes	Fire
Market	Machine	Letter	Garden
Paper	Home	Girl	Sea
Child	Earth	House	Village
King	College	Valley	Baby
Book	Butter	Engine	Table

PAUSE FOR 3 SECONDS AFTER EACH WORD

WRITE WORDS ON SHEET PROVIDED.

ALLOW UP TO ONE MINUTE FOR RECALL.

Now please tell me all the words you can recall.

ENTER THE NUMBER OF WORDS THE RESPONDENT CORRECTLY RECALLS. 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.

1.....10 GO TO PH120

98. DK

99. RF

PH120: **INTRO:** Now I am going to read the same words out again. When I have finished, I will ask you to recall aloud as many of the words as you can, in any order, including the words you recalled earlier. Is this clear?

IF RESPONDENT IS NOT CLEAR REPEAT INSTRUCTIONS.

THE LIST GENERATED FOR PH116

Word List A	Word List B	Word List C	Word List D	
Hotel	Sky	Women	Water	
River	Ocean	Rock	Church	
Tree	Flag	Blood	Doctor	
Skin	Dollar	Corner	Palace	
Gold	Wife	Shoes	Fire	
Market	Machine	Letter	Garden	
Paper	Home	Girl	Sea	
Child	Earth	House	Village	
King	College	Valley	Baby	
Book	Butter	Engine	Table	
				Now please tell me all the words you can recall?
				ENTER THE NUMBER OF WORDS THE RESPONDENT

CORRECTLY RECALLS.

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.

1.....10 GO TO PH121

98. DK

99. RF

Heart disease section

INTRO: We are interested in finding out more information about heart problems people may suffer from.

PH201: Has a doctor ever told you that you have any of the conditions on this card?

SHOW CARD PH3

PROBE - 'WHAT OTHERS?' .

- | | |
|----------------------------------------------------------|--------------------|
| 1. High blood pressure or hypertension | GO TO PH202 |
| 2. Angina | GO TO PH203 |
| 3. A heart attack | |
| (including myocardial infarction or coronary thrombosis) | GO TO PH205 |
| 4. Congestive heart failure | GO TO PH212 |
| 5. Diabetes or high blood sugar | GO TO PH213 |
| 6. A stroke (cerebral vascular disease) | GO TO PH218 |
| 7. Mini-stroke or TIA | GO TO PH221 |
| 8. High cholesterol | GO TO PH225 |
| 9. A heart murmur | GO TO PH301 |
| 10. Atrial fibrillation | GO TO PH301 |
| 11. Abnormal heart rhythm (not atrial fibrillation) | GO TO PH301 |
| 95. Any other heart trouble (specify) | GO TO PH224 |
| 96. None of these | GO TO PH301 |
| 98. DK | GO TO PH301 |
| 99. RF | GO TO PH301 |

PH202: Approximately how old were you when you were first told by a doctor that you had high blood pressure?

- 1.....97
98. DK
99. RF

PH202a: Are you currently taking any tablets or pills for high blood pressure?

1. Yes
2. No
98. DK
99. RF

BL:

IF PH201=2 GO TO PH203
IF PH201=3 GO TO PH205
IF PH201=4 GO TO PH212
IF PH201=5 GO TO PH213
IF PH201=6 GO TO PH218
IF PH201=7 GO TO PH221
IF PH201=8 GO TO PH225
IF PH201=95 GO TO PH224
OTHERWISE GO TO PH301

PH203: Approximately how old were you when you were first told by a doctor that you had angina?

1.....97

98. DK

99. RF

PH204: Are you limiting your usual activities because of your angina?

1. Yes

5. No

98. DK

99. RF

BL:

IF PH201=3 GO TO PH205

IF PH201=4 GO TO PH212

IF PH201=5 GO TO PH213

IF PH201=6 GO TO PH218

IF PH201=7 GO TO PH221

IF PH201=8 GO TO PH225

IF PH201=95 GO TO PH224

OTHERWISE GO TO PH301

PH205: Approximately how old were you when you were first told by a doctor that you had a heart attack (including myocardial infarction or coronary thrombosis)?

1...97

98. DK

99. RF

PH206: In what year/month was your (most recent) heart attack?

(MM/YYYY)

____/____

____ DK RF MONTH

____ DK RF YEAR

(HRS)

PH207: According to the doctor how many heart attacks have you had?

1.....97

98. DK

99. RF

PH208: Have you ever had an angioplasty or Stent?

1. Yes GO TO PH209

5. No GO TO PH210

98. DK

99. RF

PH209: In what year/month was your last angioplasty or Stent?

(MM/YYYY)

____/____

____ DK RF MONTH

____ DK RF YEAR

PH210: Have you ever had open heart surgery?

- 1. Yes GO TO PH211
- 5. No
- 98. DK
- 99. RF

PH211: In what year/month was your last heart surgery?
(MM/YYYY)

____/____

- ____ DK RF MONTH
- ____ DK RF YEAR

BL:

- IF PH201=4 GO TO PH212
- IF PH201=5 GO TO PH213
- IF PH201=6 GO TO PH218
- IF PH201=7 GO TO PH221
- IF PH201=8 GO TO PH225
- IF PH201=95 GO TO PH224
- OTHERWISE GO TO PH301

PH212: Approximately how old were you when you were first told by a doctor that you had congestive heart failure?

- 1....97
- 98. DK
- 99. RF

BL:

- IF PH201=5 GO TO PH213
- IF PH201=6 GO TO PH218
- IF PH201=7 GO TO PH221
- IF PH201=8 GO TO PH225
- IF PH201=95 GO TO PH224
- OTHERWISE GO TO PH301

PH213: Approximately how old were you when you were first told by a doctor that you had diabetes or high blood sugar?

- 1....97
- 98. DK
- 99. RF

PH214: Are you currently taking any tablets, pills or other medication that you swallow for diabetes?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH215: Do you currently inject insulin for diabetes?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH216: Please look at **SHOW CARD PH4**. Has a doctor ever told you that you have any of the following conditions related to your diabetes?

1. Leg ulcers
 2. Protein in your urine
 3. Lack of feeling and tingling pain in your legs and feet due to nerve damage (diabetic neuropathy)
 4. Damage to the back of your eye (diabetic retinopathy)
 5. Damage to your kidneys (diabetic nephropathy)
 6. No, none of these
98. DK
99. RF

BL:

IF PH201=6 GO TO PH218

IF PH201=7 GO TO PH221

IF PH201=8 GO TO PH225

IF PH201=95 GO TO PH224

OTHERWISE GO TO PH301

PH218: Approximately how old were you when you were first told by a doctor that you had a stroke?

- 1....97
98. DK
99. RF

PH219: How many strokes have you had?

- 1....97
98. DK
99. RF

PH220: In what year was your most recent stroke?
(MM/YYYY)

____/____

____ DK RF MONTH

____ DK RF YEAR

BL:

IF PH201=7 GO TO PH221

IF PH201=8 GO TO PH225

IF PH201=95 GO TO PH224

OTHERWISE GO TO PH301

PH221: Approximately how old were you when you were first told by a doctor that you had a TIA, mini-stroke, or transient ischemic attack?

- 1....97
98. DK
99. RF

PH222: How many TIA's or mini-strokes have you had?

1....97

98. DK

99. RF

PH223: In what year was your most recent TIA or mini-strokes?
(MM/YYYY)

____/____

____ DK RF MONTH

____ DK RF YEAR

BL:

IF PH201=95 GO TO PH224

IF PH201=8 GO TO PH225

OTHERWISE GO TO PH301

PH224: Approximately how old were you when you were first told by a doctor that you had any other heart trouble?

1....120

98. DK

99. RF

BL:

IF PH201=8 GO TO PH225

OTHERWISE GO TO PH301

PH225: Are you currently taking any tablets or pills for high cholesterol?

1. Yes

2. No

98. DK

99. RF

Other chronic conditions

PH301: Has a doctor ever told you that you have any of the following conditions?

SHOW CARD PH5

PROBE - 'WHAT OTHERS?'

- | | |
|----------------------------------------------------------------------------------------------------|---------------------|
| 1. Chronic lung disease such as chronic bronchitis or emphysema | GO TO PH302 |
| 2. Asthma | |
| 3. Arthritis (including osteoarthritis, or rheumatism) | GO TO PH304 |
| 4. Osteoporosis, sometimes called thin or brittle bones | |
| 5. Cancer or a malignant tumour (including leukaemia or lymphoma but excluding minor skin cancers) | GO TO PH309 |
| 6. Parkinson's disease | GO TO PH314 |
| 7. Any emotional, nervous or psychiatric problems, such as depression or anxiety | GO TO PH315 |
| 8. Alcohol abuse | GO TO PH320 |
| 9. Substance abuse | GO TO PH325 |
| 10. Alzheimer's disease | GO TO PH318 |
| 11. Dementia | GO TO PH319 |
| 12. Serious memory impairment | GO TO PH319a |
| 13. Stomach ulcers | |
| 14. Varicose Ulcers (an ulcer due to varicose veins) | |
| 15. Cirrhosis, or serious liver damage | |
| 96. None of these | |
| 98. DK | |
| 99. RF | |

BL:

IF PH301=2, 4, 10, 12, 13, 14, 96, 98, 99 GO TO PH401

IF (PH301 = 2) ASK PH302 OTHERS GO TO PH304

PH302: Are you receiving oxygen for your lung condition?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH303: Does your lung condition limit your usual activities, such as household chores or work?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

IF (PH301 = 3) ASK PH304 OTHERS GO TO PH309

PH304: Which type or types of arthritis do you have?

- 1. Osteoarthritis
- 2. Rheumatoid arthritis
- 3. Some other kind of arthritis
- 98. DK
- 99. RF

PH305: Approximately how old were you when you were first told by a doctor that you had arthritis?

- 1....97
- 98. DK
- 99. RF

PH306: Does your arthritis make it difficult for you to do your usual activities such as household chores or work?

- 1. Yes
- 2. No
- 3. Sometimes
- 98. DK
- 99. RF

PH307: Does the arthritis limit your social and leisure activities?

- 1. Yes
- 2. No
- 3. Sometimes
- 98. DK
- 99. RF

PH308: Does your arthritis make it difficult for you to sleep at night?

- 1. Yes
- 2. No
- 3. Sometimes
- 98. DK
- 99. RF

IF (PH301 = 5) ASK PH309 OTHERS GO TO PH314

PH309: Approximately how old were you when you were first told by a doctor that you had cancer or a malignant tumour?

- 1....97
- 98. DK
- 99. RF

PH310: In which organ or part of the body have you or have you had cancer?

SHOW CARD PH6

1. Lung
2. Breast
3. Colon or rectum
4. Stomach
5. Oesophagus
6. Prostate
7. Bladder
8. Liver
9. Brain
10. Ovary
11. Cervix
12. Endometrium
13. Thyroid
14. Kidney
15. Testicle
16. Pancreas
17. Malignant melanoma (skin)
18. Oral cavity
19. Larynx
20. Other pharynx (including nasopharynx, oropharynx, laryngopharynx or hypopharynx)
21. Non-Hodgkin Lymphoma
22. Leukaemia
95. Other organ
98. DK
99. RF

PH311: Have you received any treatment for your cancer?

1. Yes **GO TO PH312**
2. No **GO TO PH314**
98. DK **GO TO PH314**
99. RF **GO TO PH314**

PH312: What sort of treatments have you received for cancer? **SHOW CARD PH7**

- 1. Chemotherapy
- 2. Medication
- 3. Surgery
- 4. Biopsy
- 5. Radiation/X-Ray
- 6. Treatment for symptoms (pain, nausea, rashes)
- 95. Other (specify)
- 98. DK
- 99. RF

PH313: Since you received treatment has the cancer got worse, better or stayed about the same?

- 1. Better
- 2. About the same
- 3. Worse
- 98. DK
- 99. RF

IF (PH301 = 6) ASK PH314 OTHERS GO TO PH315

PH314: Approximately how old were you when you were first told by a doctor that you had Parkinson's disease?

- 1....97
- 98. DK
- 99. RF

IF (PH301 = 7) ASK PH315 OTHERS GO TO PH318

PH315: Approximately how old were you when you were first told by a doctor that you had emotional, nervous or psychiatric problems?

- 1....97
- 98. DK
- 99. RF

PH316: What type of emotional, nervous or psychiatric problems do/did you have?

SHOW CARD PH8

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

PH317: Do you now get psychiatric treatment for your problems, such as attending a psychiatrist?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH317a: Do you now get psychological treatment for your problems, such as counselling?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

IF (PH301 = 10) ASK PH318 OTHERS GO TO PH320

PH318: Approximately how old were you when you were first told by a doctor that you had Alzheimer's Disease?

- 1....97
- 98. DK
- 99. RF

IF (PH301 = 11) ASK PH319 OTHERS GO TO PH319a

PH319: Approximately how old were you when you were first told by a doctor that you had dementia, senility?

- 1....97
- 98. DK
- 99. RF

IF (PH301 = 12) ASK PH319a OTHERS GO TO PH320

PH319a: Approximately how old were you when you were first told by a doctor that you had serious memory impairment?

- 1....97
- 98. DK
- 99. RF

IF (PH301 = 8) ASK PH320 OTHERS GO TO PH325

PH320: Approximately how old were you when you were first told by a doctor that you suffered from alcohol abuse?

- 1....97
- 98. DK
- 99. RF

PH321: Do you currently suffer from alcohol abuse?

- 1. Yes **GO TO PH322**
- 2. No **GO TO PH323**
- 98. DK **GO TO PH323**
- 99. RF **GO TO PH323**

PH322: Are you receiving any treatment for your alcohol abuse?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

GO TO PH325

PH323: How long did you suffer from alcohol abuse?

- 1....97 years
- 98. DK
- 99. RF

PH324: Did you receive any treatment for your alcohol abuse?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

IF (PH301 = 9) ASK PH325 OTHERS GO TO PH325

PH325: Approximately how old were you when you were first told by a doctor that you suffered from substance abuse?

- 1....97
- 98. DK
- 99. RF

PH326: Do you currently suffer from substance abuse?

- 1. Yes **GO TO PH327**
- 2. No **GO TO PH328**
- 98. DK **GO TO PH328**
- 99. RF **GO TO PH328**

PH327: Are you receiving any treatment for your substance abuse?

1. Yes

2. No

98. DK

99. RF

GO TO PH401

PH328: How long did you suffer from substance abuse?

1....97 years

98. DK

99. RF

PH329: Did you receive any treatment for your substance abuse?

1. Yes

2. No

98. DK

99. RF

Falls/Fracture section

PH401: Have you fallen in the last year?

- 1. Yes
- 2. No **GO TO PH405**
- 98. DK **GO TO PH405**
- 99. RF **GO TO PH405**

PH402: How many times have you fallen in the last year?

- 1....97
- 98. DK
- 99. RF

PH403: Were any of these falls non-accidental, i.e. with no apparent or obvious reason?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH404: Did you injure yourself seriously enough to need medical treatment?

IF YES, PROBE: Did you get medical treatment?

- 1. Yes and I got treatment
- 2. Yes and I did not get treatment
- 3. No
- 98. DK
- 99. RF

PH405: Have you ever had a blackout or fainted?

- 1. Yes
- 2. No **GO TO PH408**
- 98. DK **GO TO PH408**
- 99. RF **GO TO PH408**

PH406: Approximately how many times have you had a blackout or fainted in the last year?

- 0....97
- 98. DK
- 99. RF

PH407: Were you a frequent fainter when you were younger?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

Fear of falling

PH408: Are you afraid of falling?

- 1. Yes
- 2. No **GO TO PH411**
- 98. DK **GO TO PH411**
- 99. RF **GO TO PH411**

PH409: Do you feel somewhat afraid or very much afraid of falling?

- 1. Somewhat afraid of falling
- 2. Very much afraid of falling
- 98. DK
- 99. RF

PH410: Do you ever limit your activities, for example, what you do or where you go, because you are afraid of falling?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

Steadiness

PH411: We are interested in your steadiness when walking, standing or getting up from a chair. When walking, do you feel: **SHOW CARD PH9**

- 1. very steady,
- 2. slightly steady,
- 3. slightly unsteady,
- 4. very unsteady
- 98. DK
- 99. RF

PH412: When standing, do you feel: **SHOW CARD PH9**

- 1. very steady,
- 2. slightly steady,
- 3. slightly unsteady,
- 4. very unsteady
- 98. DK
- 99. RF

PH413: When getting up from a chair, do you feel: **SHOW CARD PH9**

- 1. very steady,
- 2. slightly steady,
- 3. slightly unsteady,
- 4. very unsteady
- 98. DK
- 99. RF

PH414: Have you ever fractured your hip or wrist?

1. Yes both
2. Yes hip
3. Yes wrist
5. No
98. DK
99. RF

PH415: Have you had any joint replacements?

1. Yes
2. No **GO TO PH418**
98. DK **GO TO PH418**
99. RF **GO TO PH418**

PH416: Which joints did you have replaced? MULTI-CODE

1. Hip
2. Both hips
3. Knee
4. Both knees
5. Other joint
98. DK
99. RF

PH417: Was the joint replacement(s) because of arthritis, a fracture or for some other reason?

1. Arthritis
2. Fracture
3. Both arthritis and a fracture
4. Other reason
98. DK
99. RF

HAND THE COGNITIVE MODULE BOOKLET TO THE RESPONDENT WITH THE WORD LIST – ANIMAL NAMES PAGE (PAGE 3) SHOWING AND ALSO HAND HIM/HER A PEN THEN SAY “These are for you”.

PAUSE FOR EXACTLY 5 SECONDS.

IF NO RESPONSE, PROMPT:

'You were going to do something when I gave you the paper and pen. Can you remember what it was?'

IF RESPONDENT SAYS 'AM I SUPPOSED TO....?' THEN SAY:

'Do whatever you think you are supposed to do'

PH418:

1. No prompt given
2. Prompt given

PH419: Now take back the booklet and pen and code what respondent did when you handed them the booklet and pen.

1. Wrote their initials in top left hand corner
2. Wrote their initials somewhere else
3. Wrote something else in top left hand corner
4. Did something else
5. Did nothing/did not remember what to do
98. DK
99. RF

Pain section

PH501: Are you often troubled with pain?

1. Yes **GO TO PH502**
2. No **GO TO PH600**
98. DK **GO TO PH600**
99. RF **GO TO PH600**

PH502: How bad is the pain most of the time? Is it...

1. mild,
2. moderate,
3. or, severe
98. DK
99. RF

PH503: Now thinking about this pain, in which part of your body is it most severe?

1. Back
2. Hips
3. Knees
4. Feet
5. Mouth/teeth
6. All over
95. Other
98. DK
99. RF

PH504: Does the pain make it difficult for you to do your usual activities such as household chores or work?

1. Yes
2. No
98. DK
99. RF

PH505: Are you taking any medication to control the pain?

1. Yes

2. No **GO TO PH600**

98. DK **GO TO PH600**

99. RF **GO TO PH600**

PH506: Does this medication control your pain?

1. Yes

2. No

3. Sometimes

98. DK

99. RF

Incontinence section

PH600 INTRO: READ OUT We are interested in finding out more about problems that affect people's quality of life. I would therefore like to ask you some questions about urinary incontinence. Is that okay?

1. Respondent agrees
2. Respondent refuses **GO TO PH701**

PH601: During the last 12 months, have you lost any amount of urine beyond your control?

1. Yes
2. No **GO TO B1**
98. DK **GO TO B1**
99. RF **GO TO B1**

PH602: Did this happen more than once during a 1 month period?

1. Yes
2. No
98. DK
99. RF

PH603: Have you ever mentioned this problem to a doctor, nurse or other health professional?

1. Yes
2. No
98. DK
99. RF

PH604: Do you ever limit your activities, for example, what you do or where you go, because of urinary incontinence?

1. Yes
2. No
98. DK
99. RF

Bowels

B1: During the last 12 months, have you had any problems controlling your bowels? By controlling your bowels we mean that this could result in accidentally having soiled pants. Leakage from the bowel, needing to GO TO the toilet frequently or urgently, sometimes not making it to the toilet in time or using aids or appliances to manage bowel problems or incontinence. Please include problems with your bowel caused by medicines that you take?

1. Yes
2. No
99. RF

IF (B1 = 1) ASK B2

B2: When you had this problem, did it last for more than one month?

1. Yes
2. No
99. RF

Medical tests

INTRO: Have you ever had any of the following medical tests or procedures?

PH701: A flu shot?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH702: A blood test for cholesterol?

- 1. Yes
 - 2. No
 - 98. DK
 - 99. RF
- (HRS)

BL:

IF (FEMALE) GO TO PH703

IF (MALE) GO TO PH710

PH703: Have you gone through the menopause? If respondent is currently going through menopause code "Yes"

- 1. Yes
- 2. No **GO TO PH708**
- 98. DK **GO TO PH708**
- 99. RF **GO TO PH708**

PH704: Can you remember approximately what age you were when it started?

- 13....[age of R]
- 98. DK
- 99. RF

PH705: Since menopause, have you used prescription hormones (examples given on card) **SHOW CARD PH11**

- 1. Yes, currently taking hormones **GO TO PH706**
- 2. Yes, but no longer taking hormones **GO TO PH707**
- 3. No **GO TO PH708**
- 98. DK **GO TO PH708**
- 99. RF **GO TO PH708**

PH706: For how many years have you been taking prescription hormones?

- 1 ... [age of R]
- 98. DK
- 99. RF

BL: GO TO PH708

PH707: For how many years did you take prescription hormones?

- 1....[age of R]
- 98. DK
- 99. RF

PH708: Do you check your breasts for lumps regularly?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH709: Have you had a mammogram or x-ray of the breast, to search for cancer?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

BL: GO TO PH712

PH710: An examination of your prostate to screen for cancer?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

PH711: A PSA blood test to screen for cancer?

NOTE: PSA blood test is a test to screen for prostate cancer

- 1. Yes
- 2. No
- 98. DK
- 99. RF

BL:

IF PH116 = 1 GO TO PH712

IF PH116 = 2 GO TO PH713

PH712: A little while ago, the computer read you a list of words twice, and you repeated the ones you could remember. Please tell me any of the words that you can remember now?

ENTER THE NUMBER OF WORDS THE RESPONDENT CORRECTLY RECALLS.

- 1....10
- 98. DK
- 99. RF

GO TO PH714

PH713: A little while ago, I read you a list of words twice, and you repeated the ones you could remember. Please tell me any of the words that you can remember now?

ENTER THE NUMBER OF WORDS THE RESPONDENT CORRECTLY RECALLS.

- 1....10
- 98. DK
- 99. RF

PH714: That is the end of the memory and concentration tasks.

PAUSE FOR EXACTLY FIVE SECONDS

IF NO RESPONSE, PROMPT: YOU WERE GOING TO DO SOMETHING WHEN I SAID THAT. CAN YOU REMEMBER WHAT IT WAS?

IF RESPONDENT SAYS 'AM I SUPPOSED TO?' THEN SAY: 'DO WHATEVER YOU THINK YOU ARE SUPPOSED TO.'

- 1. Prompt not given
- 2. Prompt given

PH715:

- 1. Reminded you to record the time
- 2. Did something else
- 3. Did nothing/did not remember what to do

98. DK

99. RF

PH716:

DURING THE COGNITIVE FUNCTION TEST WERE THERE ANY FACTORS THAT MAY HAVE IMPAIRED THE RESPONDENT'S PERFORMANCE ON THE TESTS?

- 1. YES GO TO PH717
- 2. NO GO TO PH718

PH717:

WHAT WERE THESE FACTORS?

01. Blind or poor eyesight
02. Deaf or hard of hearing
03. Hand tremors affecting writing ability
04. In pain
05. Has an illness or physical impairment that affects ability to perform the test
06. Too tired
07. Other physical impairment
08. Impaired concentration/memory (e.g. because taking medication)
09. Suffers from dementia
10. Nervous or anxious
11. General memory problems
12. Other mental impairment
13. Interrupted by phone call or visitor
14. Noisy environment
15. Someone else in the room
16. Problems with the laptop
17. Other distraction
18. Had difficulty understanding English
19. Literacy problems
95. Other

PH718:

HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION PH?

1. NEVER
2. A FEW TIMES
3. MOST OR ALL TIMES

BL: GO TO FL001

SECTION 6: I(ADL) & HELPERS (FL)

Difficulties with Activities of Daily Life

INTRO: We need to understand the difficulties people may have with various activities

IF R IS CONFINED TO BED OR A WHEELCHAIR, READ THE FOLLOWING STATEMENT:

"I AM REQUIRED TO ASK ABOUT ALL OF THESE ACTIVITIES. I REALIZE THAT YOU MAY NOT BE ABLE TO DO SOME OF THEM, BUT I WOULD APPRECIATE IT IF YOU WOULD JUST CONFIRM THAT WITH ME AS WE GO THROUGH THE LIST."

FL001: Because of a physical or mental health problem, do you have difficulty doing any of the activities on this card? **SHOW CARD FL1** Exclude any difficulties that you expect to last less than three months.

1. Walking 100 meters (100 yards)
2. Running or jogging about 1.5 kilometres (1 mile)
3. Sitting for about two hours
4. Getting up from a chair after sitting for long periods
5. Climbing several flights of stairs without resting
6. Climbing one flight of stairs without resting
7. Stooping, kneeling, or crouching
8. Reaching or extending your arms above shoulder level
9. Pulling or pushing large objects like a living room chair
10. Lifting or carrying weights over 10 pounds/5 kilos, like a heavy bag of groceries
11. Picking up a small coin from a table
96. None of these
- 99 RF

GO TO FL025
GO TO FL025

IF RESPONDENT SELECTS MORE THAN ONE DIFFICULTY ENTER THE CODE FOR THAT CONDITION AND GO TO THE ROUTED QUESTIONS. ONCE COMPLETE, ENTER THE CODE FOR THE NEXT CONDITION AND GO TO THE ROUTED QUESTIONS UNTIL ALL DIFFICULTIES ARE ENTERED. WHEN ALL CONDITIONS ARE ENTERED GO TO FL020 (IF R HAS ANY OF THE DIFFICULTIES AND SOMEONE HELPS WITH THE DIFFICULTIES) OR GO TO FL025 (IF R HAS NO DIFFICULTIES).

FL002: Because of a health or memory problem, do you have difficulty doing any of the activities on this card? Again exclude any difficulties you expect to last less than three months. **SHOW CARD FL2**

- | | |
|---------------------------------------------------|--------------------|
| 1. Dressing, including putting on shoes and socks | GO TO FL003 |
| 2. Walking across a room | GO TO FL006 |
| 3. Bathing or showering | GO TO FL009 |
| 4. Eating, such as cutting up your food | GO TO FL012 |
| 5. Getting in or out of bed | GO TO FL014 |
| 6. Using the toilet, including getting up or down | GO TO FL017 |
| 96. None of these | GO TO FL025 |
| 98. DK | GO TO FL025 |
| 99. RF | GO TO FL025 |

FL003: Do you ever use equipment or devices to help you get dressed?

- | | |
|--------|--------------------|
| 1. Yes | |
| 2. No | GO TO FL005 |
| 98. DK | GO TO FL005 |
| 99. RF | GO TO FL005 |

FL004: Which equipment is that?

- | | |
|---------------------------------|--|
| 1. Velcro fastenings on clothes | |
| 2. Shoe horn | |
| 3. Pick-up stick | |
| 4. Device for putting on socks | |
| 95. Other (specify) | |
| 98. DK | |
| 99. RF | |

FL005: Does anyone ever help you with dressing including putting on shoes and socks?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

BL:

IF FL002=2 – GO TO FL006

IF FL002=3 – GO TO FL009

IF FL002=4 – GO TO FL012

IF FL002=5 – GO TO FL014

IF FL002=6 – GO TO FL017

FL006: Do you ever use equipment or devices such as a walking stick or frame when crossing a room?

- 1. Yes
- 2. No **GO TO FL008**
- 98. DK **GO TO FL008**
- 99. RF **GO TO FL008**

FL007: Which equipment is that?

- 1. Walking stick
- 2. Walking frame
- 3. Crutches
- 4. Railing
- 5. Orthopaedic shoes
- 6. Brace (leg or back)
- 7. Limb prosthesis
- 8. Oxygen/Respirator
- 9. Furniture or walls
- 10. Wheelchair or cart
- 95. Other (specify)
- 98. DK
- 99. RF

FL008: Does anyone ever help you with walking across a room?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL009: Do you ever use equipment or devices such as a shower seat, grab rails, hand-held shower when bathing or showering?

- 1. Yes
- 2. No **GO TO FL011**
- 98. DK **GO TO FL011**
- 99. RF **GO TO FL011**

FL010: Which equipment is that?

- 1. Shower seat
- 2. Grab rails
- 3. Hand-held shower
- 4. Walking frame or stick
- 5. Rubber mat
- 95. Others (specify)
- 98. DK
- 99. RF

FL011: Does anyone ever help you with bathing or showering?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL012: Do you ever use special utensils or special dishes when you eat?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL013: Does anyone ever help you with eating?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL014: Do you ever use equipment or devices such as a stick, frame or wheelchair when getting in or out of bed?

- 1. Yes
- 2. No **GO TO FL016**
- 98. DK **GO TO FL016**
- 99. RF **GO TO FL016**

FL015: Which equipment is that?

- 1. Walking stick
- 2. Walking frame
- 3. Bed rail
- 4. Crutches
- 5. Orthopaedic Shoes
- 6. Brace (leg or back)
- 7. Prosthesis
- 8. Oxygen/Respirator
- 9. Furniture/walls
- 10. Wheelchair/cart
- 11. Bed lever
- 95. Other (specify)
- 98. DK
- 99. RF

FL016: Does anyone ever help you with getting into or out of bed?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL017: Do you ever use equipment or devices such as a raised toilet seat or portable toilet, when using the toilet?

- 1. Yes
- 2. No **GO TO FL019**
- 98. DK **GO TO FL019**
- 99. RF **GO TO FL019**

FL018: Which equipment is that?

- 1. Raised toilet seat
- 2. Portable toilet / commode
- 3. Grab rails
- 95. Others (specify)
- 98. DK
- 99. RF

FL019: Does anyone ever help you with using the toilet, including getting on and off to the toilet?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

[fl020a] – select person from the household list

FL020: Who most often helps you with (getting across a room / dressing / bathing / eating / getting in / out of bed / using the toilet)?

Text: up to 60 characters

- 98. DK
- 99. RF

FL020b Is <FL020> male or female?

- 1. Male
- 2. Female

FL021: What is that person's relationship to you?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
28. Stepfather	29. Stepmother
7. Father-in-law	6. Mother-in-law
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Non-relative - Neighbour	25. Non-relative – Neighbour
26. Non-relative - Friend	26. Non-relative – Friend
27. Non-relative - other	27. Non-relative - other

[f022b_1 to f022b_3] – select person from the household list

FL022: Does anyone else help you with this activity/these activities?

BL: REPEAT FL022 TO FL024 FOR UP TO 3 NAMES

1. Yes

2. No

98. DK

99. RF

FL023: What is her/his first name?

Text: up to 60 characters

98. DK

99. RF

FL023b Is <FL023> male or female?

1. Male

2. Female

FL024: What is that person's relationship to you?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
28. Stepfather	29. Stepmother
7. Father-in-law	6. Mother-in-law
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Non-relative - Neighbour	25. Non-relative – Neighbour
26. Non-relative - Friend	26. Non-relative – Friend
27. Non-relative - other	27. Non-relative - other

IF RESPONDENT SELECTS MORE THAN ONE DIFFICULTY ENTER THE CODE FOR THAT CONDITION AND GO TO THE ROUTED QUESTIONS. ONCE COMPLETE, ENTER THE CODE FOR THE NEXT CONDITION AND GO TO THE ROUTED QUESTIONS UNTIL ALL DIFFICULTIES ARE ENTERED. WHEN ALL CONDITIONS ARE ENTERED GO TO FL031

FL025: Because of a health or memory problem, do you have difficulty doing any of the activities on this card? Again exclude any difficulties you expect to last less than three months. **SHOW CARD FL3**

- | | |
|-----------------------------------------------------------------------|--------------------|
| 1. Preparing a hot meal | GO TO FL026 |
| 2. Doing household chores (laundry, cleaning) | GO TO FL027 |
| 3. Shopping for groceries | GO TO FL028 |
| 4. Making telephone calls | GO TO FL029 |
| 5. Taking medications | GO TO FL030 |
| 6. Managing money, such as paying bills and keeping track of expenses | GO TO FL031 |
| 96. None of these | GO TO FL042 |
| 99. RF | GO TO FL042 |

FL026: Does anyone help you with preparing a hot meal?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL027: Does anyone help you with doing household chores?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL028: Does anyone help you with shopping for groceries?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL029: Does anyone help you make phone calls?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL030: Does anyone help you take your medications?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL031: Does anyone help you with managing your own money?

1. Yes

2. No

98. DK

99. RF

[fl032a] – select person from the household list

FL032: Who most often helps you with (preparing meals/doing household chores/shopping for groceries/making telephone calls/your medications)?
Text: up to 60 characters

98. DK

99. RF

FL032b Is <FL032> male or female?

1.Male

2.Female

FL033: What is that person's relationship to you?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
28. Stepfather	29. Stepmother
7. Father-in-law	6. Mother-in-law
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Non-relative - Neighbour	25. Non-relative – Neighbour
26. Non-relative - Friend	26. Non-relative – Friend
27. Non-relative - other	27. Non-relative - other

[fl034b_1 to fl034b_3] – select person from the household list

FL034: Does anyone else help you with this activity/these activities?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL035: What is his/her first name?

Text: up to 60 characters

- 98. DK
- 99. RF

FL035b Is <FL035> male or female?

- 1. Male
- 2. Female

FL036: What is that person's relationship to you?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
28. Stepfather	29. Stepmother
7. Father-in-law	6. Mother-in-law
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Non-relative - Neighbour	25. Non-relative – Neighbour
26. Non-relative - Friend	26. Non-relative – Friend
27. Non-relative - other	27. Non-relative - other

[fl037a] – select person from the household list

FL037: Who most often helps you to manage your money?

Text: up to 60 characters

98. DK

99. RF

FL037b Is <FL037> male or female?

1. Male

2. Female

FL038: What is that person's relationship to you?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
28. Stepfather	29. Stepmother
7. Father-in-law	6. Mother-in-law
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Non-relative - Neighbour	25. Non-relative – Neighbour
26. Non-relative - Friend	26. Non-relative – Friend
27. Non-relative - other	27. Non-relative - other

[f1039b_1 to f1039b_3] – select person from the household list

FL039: Does anyone else help you with this activity/these activities?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

FL040: What is his/her first name?

Text: up to 60 characters

- 98. DK
- 99. RF

FL040b Is <FL040> male or female?

- 1. Male
- 2. Female

FL041: What is that person's relationship to you?

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
28. Stepfather	29. Stepmother
7. Father-in-law	6. Mother-in-law
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative
25. Non-relative - Neighbour	25. Non-relative – Neighbour
26. Non-relative - Friend	26. Non-relative – Friend
27. Non-relative - other	27. Non-relative - other

Helpers

BL: REPEAT FL042 THROUGH FL053 FOR THE HELPERS ON THE LIST.

FL042: Let's think for a moment about the help you receive with the difficulties that we just talked about. During the last month, on about how many days did HELPER's NAME help you?

0... 31

98. RF

99. DK

FL043: On the days when HELPER's NAME helps you, about how many hours per day do they spend helping you?

IF HELPER PROVIDES LESS THAN AN HOUR PER DAY CODE 1

1...24

2. 98. DK

3. 99. RF

BL: IF HELPER IS A SPOUSE GO TO FL045 THEN GO TO LOOP FL042 (NEXT HELPER)

FL045: Does HELPER's NAME receive Carer's Allowance?

1. Yes

2. No

98. DK

99. RF

FL045b: Does HELPER's NAME receive regular payment from you , your family or from an agency or organisation to help care for you?

1. Yes **GO TO FL046**

2. No **GO TO FL042 (next helper)**

FL046: Is this person [helper's name]:

1. From a private agency

2. From a non-profit organization (such as the Alzheimer's Society, etc.)

3. From the government (local health board)

4. Family or Friend who is paid to help

5. Other

FL047: Thinking now about the cost of this paid help in the past month, about what percentage of this cost does the government cover?

0...100

98. DK

99. RF

FL048: Not counting costs paid by the government, about how much did you (and your [husband/wife/partner]) pay HELPER's NAME in the last month?

£0 ... £100,000

98. DK

99. RF

FL049: Does any other person help you (and your [husband/wife/partner]) pay for this cost?

1. Yes

2. No **GO TO FL042**

98. DK

99. RF

FL050: Is that a (child or other) relative of yours (and your [husband/wife/partner]), or is that someone else?

1. Child/child in-law/grandchild

GO TO FL051

2. Other relative **LOOP FL042**

3. Someone else **LOOP FL042**

98. DK

99. RF

FL051: Which child is that?

ENTER NAME OF CHILD

Text: up to 60 characters

98. DK

99. RF

FL052: Any other child?

1. Yes

2. No **GO TO THE NEXT HELPER**

98. DK

99. RF

FL053. What is her/his name?

Text: up to 60 characters

98. DK

99. RF

BL: END OF LOOP QUESTION

IF (FL001 = None of these or REF OR FL002 = None of these, DK or REF) AND (FL025 = None of these, REF) then skip over FL054 and GO TO FL056

FL054: How many different paid helpers – **in total** - have been involved in taking care of you in the last two years? (If all helpers are unpaid relatives or friends code 0)

0... 10

98. DK

99. RF

FL056:

IWER (CODE WITHOUT ASKING): HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION FL

1. NEVER

2. A FEW TIMES

3. MOST OR ALL OF THE TIME

BL: GO TO HU001

SECTION 8: EMPLOYMENT SITUATION (WE)**Current activity status**

WE001: Please look at **SHOW CARD WE1**. Now I'm going to ask you some questions about work, retirement and pensions. Which one of these would you say best describes your current situation?

- 1 Retired **GO TO WE003**
- 2 Employed **GO TO NI001**
(including unpaid work in family business, temporarily away from work, or participating in apprenticeship or employment programme - such as Community Employment)
- 3 Self-employed (including farming) **GO TO NI001**
- 4 Unemployed **GO TO WE003**
- 5 Permanently sick or disabled **GO TO WE003**
- 6 Looking after home or family **GO TO WE003**
- 7 In education or training **GO TO WE003**
- 95 Other (specify) **GO TO WE002**
- 98. DK **GO TO WE003**
- 99. RF **GO TO WE003**

WE002: Other (specify)
Text: up to 60 characters
98. DK
99. RF

WE003: Did you, nevertheless, do any paid work during the last week, either as an employee or self-employed, for at the least one hour?

- 1. Yes **GO TO NI001**
- 2. No
- 98. DK
- 99. RF

WE004: Have you ever done any paid work?

- 1. Yes
- 2. No
- 98. DK
- 99. RF

IF (WE001 = 6 or 7 AND WE004 = 1) ASK WE005 OTHERS GO TO WE010

WE005: Why are you not currently working?

- 1. Because of health problems
- 2. Work was too demanding
- 3. It was too expensive to hire someone to look after home or family
- 4. Because you wanted to take care of children or grandchildren
- 95. Other **GO TO WE006**
- 98. DK
- 99. RF

WE006: Other (specify)
Text: up to 60 characters
98. DK

99. RF

IF (Sex = male AND Age < 65) OR (Sex = female AND Age < 60)

WE010: Do you currently pay National Insurance contributions, including any that are paid on your behalf?

1. Yes
2. No

IF WE010 = 2 ASK WE011 OTHERS GO TO NI001

WE011: Have you ever paid National Insurance contributions including any that have been paid on your behalf?

1. Yes
2. No

IF female AND Married AND WE010 = 1 OR WE011 = 1

WE012: Have you ever paid NI contributions at the reduced rate for married women? This is sometimes known as the 'half stamp'.

1. Yes
2. No

WE107: How many hours a week do you usually work in this job, excluding meal breaks (but including any paid or unpaid overtime)?

0.0..168.0

98. DK **GO TO WE109**

99. RF **GO TO WE109**

WE110x: What kind of business, industry or services do you work in (that is, what do they make or do at the place where you work)? **SHOW CARD WE4**

- 1 A Agriculture, forestry and fishing
- 2 B Mining and quarrying
- 3 C Manufacturing
- 4 D Electricity, gas, steam and air conditioning supply
- 5 E Water supply; sewerage, waste management and remediation activities
- 6 F Construction
- 7 G Wholesale and retail trade; repair of motor vehicles and motorcycles
- 8 H Transportation and storage
- 9 I Accommodation and food service activities
- 10 J Information and communication
- 11 K Financial and insurance activities
- 12 L Real estate activities
- 13 M Professional, scientific and technical activities
- 14 N Administrative and support service activities
- 15 O Public administration and defence; compulsory social security
- 16 P Education
- 17 Q Human health and social work activities
- 18 R Arts, entertainment and recreation
- 19 S Other service activities
- 20 T Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use
- 21 U Activities of extra territorial organisations and bodies
- 22 CANNOT CLASSIFY

WE110: Record verbatim what kind of business, industry or services the respondent works in?

Text: up to 60 characters

98. DK

99. RF

GO TO WE111

WE111: About how many people (including yourself) are employed at the place where you usually work? **SHOW CARD WE5**

1. 1 to 5
2. 6 to 15
3. 16 to 24
4. 25 to 199
5. 200 to 499
6. 500 or more
98. DK
99. RF

NOTE: By this we mean the whole organisation, not the branch, plant or service you work.

Wages

WE112: Thinking about your typical wage/salary payment, how long of a period would this cover?

1. One week
2. Two weeks
3. A month (4 weeks)
4. Three months (13 weeks)
5. Six months (26 weeks)
6. One year (12 months/52 weeks)
7. Don't receive monetary payment **GO TO WE134**
95. Other (specify) **GO TO WE113**
98. DK **GO TO WE130**
99. RF **GO TO WE130**

IF (WE112 = 95) ASK WE113 OTHERS GO TO WE114

WE113: Other (specify) **GO TO WE114**

98. DK **GO TO WE130**
99. RF **GO TO WE130**

IF (WE112=1, 2, 3, 4, 5, 6, 95) ASK WE114 OTHERS GO TO WE130

WE114: Before any deductions for tax, national insurance or pension and health contributions, union subscriptions and so on, about how much is your typical wage/salary payment? Include regular overtime, commission, tips etc.

£0 ... £500,000 **GO TO WE122**

98. DK
99. RF

[UPPER LIMITS : WE112 (1) = 10,000, WE112(2) = 20,000, WE112(3) = 40,000, WE112(4) = 120,000, WE112(5) = 250,000, WE112(95) = 250,000]

IF (WE112=1 AND WE114=98, 99) ASK WE115 OTHERS GO TO WE116

WE115: Did it amount to a total of less than _____, more than _____, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £300, £450, £600, £1,150.

98. DK
99. RF

IF (WE112=2 AND WE114=98, 99) ASK WE116 OTHERS GO TO WE117

WE116: Did it amount to a total of less than _____, more than _____, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £600, £900, £1,250, £2,500.

98. DK
99. RF

IF (WE112=3 AND WE114=98, 99) ASK WE117 OTHERS GO TO WE118

WE117: Did it amount to a total of less than _____, more than _____, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £1,250, £1,900, £2,500, £5,000.

98. DK
99. RF

IF (WE112=4 AND WE114=98, 99) ASK WE118 OTHERS GO TO WE119

WE118: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £3,750, £5,600, £7,500, £15,000.

98. DK

99. RF

IF (WE112=5 AND WE114=98, 99) ASK WE119 OTHERS GO TO WE120

WE119: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £7,500, £11,250, £15,000, £30,000.

98. DK

99. RF

IF (WE112=6 AND WE114=98, 99) ASK WE120 OTHERS GO TO WE121

WE120: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £15,000, £22,500, £30,000, £60,000.

98. DK

99. RF

IF (WE112=95 AND WE114=98, 99) ASK WE121 OTHERS GO TO WE122

WE121: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £15,000, £22,500, £30,000, £60,000.

98. DK

99. RF

WE122: Usually people have some deductions made at source such as Income tax, national insurance, pension or trade union subscriptions, life assurance premiums, private health insurance (e.g. BUPA) or other. What is the total net amount, i.e. after deductions at source and excluding expense refunds, you receive in your typical wage/salary payment? Include regular overtime, commission, tips etc.

£0 ... and £500,000 **GO TO WE130**

98. DK

99. RF

[UPPER LIMITS : WE112 (1) = 10,000, WE112(2) = 20,000, WE112(3) = 40,000, WE112(4) = 120,000, WE112(5) = 250,000, WE112(95) = 250,000]

CHECKS

IF (WE122 >= 0 & WE122 <= 500,000 & (we114#98 & we114#99) & (we122-we114)>=0) GO TO WE150

IF (WE122 >= 0 & WE122 <= 500,000 & (we114#98 & we114#99) & ((we114-we122)/we114 >=0.60)) GO TO WE150

IF (WE122 >= 0 & WE122 <= 500,000 & (we114#98 & we114#99) & ((we114-we122)/we114 <0.60)) GO TO WE134

IF WE112=1 AND WE122=98, 99 GO TO WE123

IF WE112=2 AND WE122=98, 99 GO TO WE124

IF WE112=3 AND WE122=98, 99 GO TO WE125

IF WE112=4 AND WE122=98, 99 GO TO WE126

IF WE112=5 AND WE122=98, 99 GO TO WE127

IF WE112=6 AND WE122=98, 99 GO TO WE128

IF WE112=95 AND WE122=98, 99 GO TO WE129

WE150: INTERVIEWER: The gross figure you have given [we114] is smaller/the same/much bigger when compared to the net figure [we122] you have given. Could you please confirm this is the case? If you are satisfied that these are correct then we can proceed to the next question

IF NOT SATISFIED GO BACK TO WE112

IF (WE112=1 AND WE122=98, 99) ASK WE123 OTHERS GO TO WE124

WE123: Did it amount to a total of less than _____, more than _____, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £250, £350, £500, £1,000.

98. DK

99. RF

IF (WE112=2 AND WE122=98, 99) ASK WE124 OTHERS GO TO WE125

WE124: Did it amount to a total of less than _____, more than _____, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £550, £800, £1,100, £2,150.

98. DK

99. RF

IF (WE112=3 AND WE122=98, 99) ASK WE125 OTHERS GO TO WE126

WE125: Did it amount to a total of less than _____, more than _____, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £1100, £1,600, £2,150, £4,300.

98. DK

99. RF

IF (WE112=4 AND WE122=98, 99) ASK WE126 OTHERS GO TO WE127

WE126: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £3,250, £4,900, £6,500, £13,000.

98. DK

99. RF

IF (WE112=5 AND WE122=98, 99) ASK WE127 OTHERS GO TO WE128

WE127: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £6,500, £9,750, £13,000, £26,000.

98. DK

99. RF

IF (WE112=6 AND WE122=98, 99) ASK WE128 OTHERS GO TO WE129

WE128: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £13,000, £19,500, £26,000, £52,000.

98. DK

99. RF

IF (WE112=95 AND WE122=98, 99) ASK WE129 OTHERS GO TO WE130

WE129: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £13,000, £19,500, £26,000, £52,000.

98. DK

99. RF

IF (WE112 = 98, 99) ASK WE130 OTHERS GO TO WE134

WE130: What was the total gross amount you earned in the last 12 months in this job?

(Include all types of overtime, commission, bonuses, share options etc.)

£0 ... and £1,000,000

98. DK **GO TO WE131**

99. RF **GO TO WE131**

IF (WE130 = 98, 99) ASK WE131 OTHERS GO TO WE134

WE131: Did it amount to a total of less than _____ , more than _____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £15,000, £22,500, £30,000, £60,000.

98. DK

99. RF

WEWS01 Work stress

Here are some statements people might use to describe their work.
We would like to know how strongly you think these apply to your job.

Tick one box on each line

SHOW CARD WE6

STATEMENT	Strongly agree	Agree	Disagree	Strongly disagree
1. All things considered I am satisfied with my job	1	2	3	4
2. My job is physically demanding	1	2	3	4
3. I receive the recognition I deserve for my work	1	2	3	4
4. My salary is adequate	1	2	3	4
5. My job promotion prospects are poor	1	2	3	4
6. My job security is poor	1	2	3	4
7. I am under constant time pressure due to a heavy workload	1	2	3	4
8. I have very little freedom to decide how I do my work	1	2	3	4
9. I have the opportunity to develop new skills	1	2	3	4
10. I receive adequate support in difficult situations	1	2	3	4
11. At work, I feel I have control over what happens in most situations	1	2	3	4
12. Considering the things I have to do at work, I have to work very fast	1	2	3	4

**IF (WE001 = 4) ASK WE401 OTHERS GO TO WE501
Unemployed**

WE401: In what year did you become unemployed?

YEAR ([Birth year + 10]...[current year])

98. DK **GO TO WE403**

99. RF **GO TO WE403**

WE402: In what month did you become unemployed?

MONTH

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

WE403: Would you tell us how you became unemployed? Was it: **SHOW CARD WE10**

1. Because your place of work or office closed
2. Because you resigned
3. Because you were laid off
4. By mutual agreement between you and your employer
5. Because a temporary job had been completed
95. Other reason
98. DK
99. RF

WE404: Have you been doing anything to find work during the last four weeks?

1. Yes **GO TO WE409**
2. No **GO TO WE405**
98. DK **GO TO UW001**
99. RF **GO TO UW001**

WE405: What is the main reason you were not looking for work during the last four weeks? **SHOW CARD WE11**

1. Believes nothing available in line of work is available
2. Doesn't believe can find work
3. Doesn't have needed skills /experience
4. Believes employers think he/she too old
5. Believes employers won't hire older women or minorities
6. Poor health, disability
7. Family responsibilities/child responsibilities
8. Transportation problems
9. No particular reason
95. Other (specify) **GO TO WE406**
98. DK
99. RF

WE406: Other (specify)

98. DK
99. RF

GO TO UW001

WE409: How many employers did you call, write to or visit in the last four weeks?

- 0...50
98. DK
99. RF

WE410: Are you looking for part-time or full-time work?

1. Part-time
2. Full-time
3. Either kind
98. DK
99. RF

WE411: What is the lowest monthly wage you would accept if a job was offered to you?

- AMOUNT
- £0...£10,000
98. DK
 99. RF

WE412: Are you available for work immediately (i.e. within two weeks)?

1. Yes
2. No
98. DK
99. RF

IF (WE001 = 5) ASK WE501 OTHERS GO TO WE601
Permanently sick or disabled

WE501: In what year did you become disabled?

YEAR

[Birth year]..... [current year]

98. DK **GO TO WE503**

99. RF **GO TO WE503**

WE502: In what month did you become disabled?

MONTH

1. January

2. February

3. March

4. April

5. May

6. June

7. July

8. August

9. September

10. October

11. November

12. December

98. DK

99. RF

WE503: Was this illness caused by the working activities in your last job?

1. Yes

2. No

98. DK

99. RF

| **IF (WE001 =1) ASK WE601 OTHERS GO TO UW001**
Retired

WE601: In what month and year did you retire?

YEAR

1950...[current year]

98. DK **GO TO WE610**

99. RF **GO TO WE610**

WE602: In what month and year did you retire?

MONTH

1. January

2. February

3. March

4. April

5. May

6. June

7. July

8. August

9. September

10. October

11. November

12. December

98. DK **GO TO WE610**

99. RF **GO TO WE610**

WE610: I'd like to ask some details about your last job. In what year did you stop working at this job?

YEAR

1950... [current year]

98. DK **GO TO WE612**

99. RF **GO TO WE612**

WE611: In what month did you stop working at this job?

MONTH

1. January

2. February

3. March

4. April

5. May

6. June

7. July

8. August

9. September

10. October

11. November

12. December

98. DK **GO TO WE612**

99. RF **GO TO WE612**

WE612: For how many years had you been working in your last job before you left?

0...50

98. DK

99. RF

WE613: What was the name or title of this job?

Text: up to 60 characters

98. DK

99. RF

WE614: Were you employed in the public sector?

1. Yes

5. No

98. DK

99. RF

WE615: Could you please tell me, was this

1. A permanent job

2. A temporary job

3. Occasional work without a contract

4. Other working arrangement

98. DK

99. RF

WESW01:Shift work

Which of the categories on this card best describes the times of day you usually worked? **SHOW CARD WE14**

SINGLE CODE

1. Mornings only
2. Afternoons only
3. During the day
4. Evenings only
5. At night
6. Both lunchtimes and evenings
7. Other times of day
8. Rotating shifts
9. Varies/no usual pattern
10. Daytime and evenings
95. Other
98. DK
99. RF

WE616: How many hours a week did you usually work in this job, excluding meal breaks or any paid or unpaid overtime?

0.0..168.0

98. DK
99. RF

WE617x: What kind of business, industry or services did you work in (that is, what did they make or do at the place where you work)? **SHOW CARD WE15**

Note: By this we mean what did they do or make at the place where you worked.

- 1 A Agriculture, forestry and fishing
- 2 B Mining and quarrying
- 3 C Manufacturing
- 4 D Electricity, gas, steam and air conditioning supply
- 5 E Water supply; sewerage, waste management and remediation activities
- 6 F Construction
- 7 G Wholesale and retail trade; repair of motor vehicles and motorcycles
- 8 H Transportation and storage
- 9 I Accommodation and food service activities
- 10 J Information and communication
- 11 K Financial and insurance activities
- 12 L Real estate activities
- 13 M Professional, scientific and technical activities
- 14 N Administrative and support service activities
- 15 O Public administration and defence; compulsory social security
- 16 P Education
- 17 Q Human health and social work activities
- 18 R Arts, entertainment and recreation
- 19 S Other service activities
- 20 T Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use
- 21 U Activities of extra territorial organisations and bodies
- 22 CANNOT CLASSIFY

Industry need only be recorded verbatim if iwer cannot classify (Code 22)

WE617: Record verbatim what kind of business, industry or services the respondent worked in?

Text: up to 60 characters

98. DK

99. RF

GO TO WE618

WE618: About how many people (including yourself) were employed at the place where you worked? **SHOW CARD WE16**

1. 1 to 5
2. 6 to 15
3. 16 to 24
4. 25 to 199
5. 200 to 499
6. 500 or more
98. DK
99. RF

WE619: In this job, did you have any responsibility for supervising the work of other employees?

- 1. Yes **GO TO WE620**
- 5. No **GO TO WE621**
- 98. DK **GO TO WE621**
- 99. RF **GO TO WE621**

WE620: About how many people were you responsible for in this job?

SHOW CARD WE16

- 1. 1 to 5
- 2. 6 to 15
- 3. 16 to 24
- 4. 25 to 199
- 5. 200 to 499
- 6. 500 or more
- 98. DK
- 99. RF

WE621: What was the total net salary/wage (i.e. after deductions at source and excluding expense refunds) you received in the last year you worked in this job?

£0 ...£1,000,000 **GO TO WE623**

- 98. DK **GO TO WE622**
- 99. RF **GO TO WE622**

WE622: Did it amount to a total of less than _____, more than _____, or what?

PROCEDURES: 2Up1Down, 1Up2Down

BREAKPOINTS: £13,000, £19,500, £26,000, £52,000.

- 98. DK
- 99. RF

Unpaid work

UW001: *Are you involved in voluntary work or charitable activity? Please include any time you spend travelling so that you can do these activities.*

- 1. No
- 2. Yes, 1-4 hours per week
- 3. Yes, 5-9 hours per week
- 4. Yes, 10-19 hours per week
- 5. Yes, 20-34 hours per week
- 6. Yes, 35-49 hours per week
- 7. Yes, 50 hours or more a week

UW002: Care

Do you look after, or give any help or support to family members, friends, neighbours or others because of either: long-term physical or mental ill-health/disability? Or problems related to old-age? Please include any time you spend travelling so that you can do these activities. (Do not count anything you do as part of paid employment).

1. No
2. Yes, 1-4 hours per week
3. Yes, 5-9 hours per week
4. Yes, 10-19 hours per week
5. Yes, 20-34 hours per week
6. Yes, 35-49 hours per week
7. Yes, 50 hours or more a week

Caring – Intellectual /learning disability

CW002: *Is there someone in the household who has an intellectual/learning disability?*

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

IF (CW002 = (1) Yes) ASK CW002b

CW002b: How many members of your household have a learning disability?

Range: 1..3

LOOP CW003 to CW005 for each person

CW004: *Starting from the oldest householder with a learning disability are they :*

- 1: Male
- 2: Female

CW003: *What is [his/her] age and date of birth?*

- 1: Age
- 2: D:O:B
- 3: Don't know

CW005: *What is your relationship to [him/her]?*

MALES	FEMALES
1. Husband	2. Wife
3. Partner/cohabitee	3. Partner/cohabitee
5. Father	4. Mother
7. Father-in-law	6. Mother-in-law
26. Stepfather	27. Stepmother
8. Son (Including adopted and foster)	9. Daughter (Including adopted and foster)
10. Step son	11. Step daughter
12. Son-in-law	13. Daughter-in-law
14. Brother	15. Sister
16. Brother-in-law	17. Sister-in-law
19. Grand-son	18. Grand-daughter
20. Grandfather	21. Grandmother
23. Uncle	22. Aunt
24. Other relative	24. Other relative

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CareChld

UW003: *Do you look after/care for children - either your own or other family members? (Do not count anything you do as part of paid employment).*

IF YES, For how many hours per week?

1. No
2. Yes, 1-4 hours per week
3. Yes, 5-9 hours per week
4. Yes, 10-19 hours per week
5. Yes, 20-34 hours per week
6. Yes, 35-49 hours per week
7. Yes, 50 hours or more a week

Cook

UW004: *Do you do cooking and housework? (Do not count anything you do as part of paid employment).*

IF YES, For how many hours per week?

1. No
2. Yes, 1-4 hours per week
3. Yes, 5-9 hours per week
4. Yes, 10-19 hours per week
5. Yes, 20-34 hours per week
6. Yes, 35-49 hours per week
7. Yes, 50 hours or more a week

WE623:

HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION WE?

1. NEVER

2. A FEW TIMES

3. MOST OR ALL OF THE TIME

SECTION 9: HEALTHCARE UTILISATION (HU)

INTRO: Now we have some questions about your healthcare

HU005: In the last 12 months, about how often did you visit your GP?

IF RESPONDENT HAS NOT VISITED GP IN THE LAST 12 MONTHS CODE 0

0...200

98. DK **GO TO HU007**

99. RF **GO TO HU007**

HU007: In the last 12 months, how many times did you visit a hospital Emergency Department (sometimes called A&E or Accident and Emergency) as a patient?

IF RESPONDENT HAS NOT VISITED AN A&E DEPARTMENT IN THE LAST 12 MONTHS CODE 0

0... 200

98. DK

99. RF

HU008: In the last 12 months, about how many visits did you make to a hospital as an out-patient? (Include all types of consultations, tests, operations, procedures or treatments)

IF RESPONDENT HAS NOT MADE ANY OUT-PATIENT VISITS, CODE 0

0...200

98. DK **GO TO HU010**

99. RF **GO TO HU010**

HU009: On how many of these visits did you have a substantial procedure, operation or test i.e. one which took a considerable amount of time to perform?

Note: These are sometimes called day-case procedures.

IF RESPONDENT HAS NOT UNDERGONE ANY DAY-CASE PROCEDURES CODE 0

0... 200

98. DK

99. RF

HU010: In the last 12 months, on how many occasions were you admitted to hospital overnight?

IF RESPONDENT HAS NOT ADMITTED TO HOSPITAL OVERNIGHT IN THE LAST 12 MONTHS CODE 0

0...50

98. DK **GO TO HU015**

99. RF **GO TO HU015**

Note: These are sometimes called in-patient admissions.

HU011: During these hospital stays in the last 12 months, about how many operations (procedures) involving a full anaesthetic did you have?

IF RESPONDENT HAS NOT HAD ANY OPERATIONS (PROCEDURES) INVOLVING A FULL ANAESTHETIC IN THE LAST 12 MONTHS CODE 0

0...50

98. DK

99. RF

HU012: In total, about how many nights did you spend in hospital in the last 12 months?

1...364

98. DK

99. RF

HU013: When you stayed overnight in hospital, was this

IF THE RESPONDENT HAS HAD INPATIENT ADMISSIONS AS BOTH A PUBLIC AND A PRIVATE PATIENT PLEASE CODE THE MOST USUAL

1. As a public patient

2. As a private patient

98. DK

99. RF

HU014: When you stayed overnight in hospital, was this in a

IF THE RESPONDENT HAS HAD INPATIENT ADMISSIONS AS BOTH A PUBLIC AND A PRIVATE HOSPITAL PLEASE CODE THE MOST USUAL

1. Public Hospital

2. Private Hospital

98. DK

99. RF

HU037:

HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION HU

1. NEVER

2. A FEW TIMES

3. MOST OR ALL OF THE TIME

BL: GO TO MH001

SECTION 10: HEALTH BEHAVIOUR (HB)

INTRO: Now I would like to ask some questions about your lifestyle.

BH001: Have you ever smoked cigarettes, cigars, cigarillos or a pipe daily for a period of at least one year?

- 1. Yes **GO TO BH002**
- 2. No **GO TO BH101**
- 98. DK **GO TO BH101**
- 99. RF **GO TO BH101**

BH002: Do you smoke at the present time?

IF RESPONDENT SMOKED IN THE PAST 3 MONTHS CODE 1

- 1. Yes **GO TO BH005**
- 2. No, I have stopped **GO TO BH002b**
- 98. DK **GO TO BH002b**
- 99. RF **GO TO BH002b**

BH002b: When did you last smoke regularly?

- 1. Within the last 12 months
- 2. More than 12 months ago but within the last ten years
- 3. More than 10 years ago.
- 98. DK
- 99. RF

BH005: What do/did you smoke (before you stopped)?

CODE ALL THAT APPLY

- 1. Cigarettes **GO TO BH006**
- 2. Roll ups **GO TO BH006b**
- 3. Pipe **GO TO BH007**
- 4. Cigars or cigarillos **GO TO BH008**
- 98. DK **GO TO BH101**
- 99. RF **GO TO BH101**

IF (BH005 = 1) ASK BH006

BH006: How many cigarettes do/did you smoke on average per day?

1 ... 100

98. DK

99. RF

IF (BH005 = 2) ASK BH006b

BH006b: How many roll ups do/did you smoke on average per day?

1 ... 100

98. DK

99. RF

IF (BH005 = 3) ASK BH007

BH007: How many pipes do/did you smoke on average per day?

1 ... 100

98. DK

99. RF

IF (BH005 = 4) ASK BH008

BH008: How many cigars or cigarillos do/did you smoke on average per day?

1 ... 100

98. DK

99. RF

Physical Activity section

INTRO: We are interested in finding out about the kinds of physical activities that people do as part of their everyday lives. The next set of questions will ask you about the time you spent being physically active in the last 7 days. Please answer each question even if you do not consider yourself to be an active person. Please think about the activities you do at work, as part of your house and garden work, to get from place to place, and in your spare time for recreation, exercise or sport.

Think about all the vigorous activities that you did in the **last 7 days**. **Vigorous** physical activities refer to activities that take hard physical effort and make you breathe much harder than normal. Think *only* about those physical activities that you did for at least 10 minutes at a time.

BH101: During the **last 7 days**, on how many days did you do **vigorous** physical activities like heavy lifting, digging, aerobics, or fast bicycling?

1. _____ Number of days per week
 2. No I have not done any vigorous physical activities **GO TO BH103**
98. DK/ NOT SURE **GO TO BH103**
99. RF **GO TO BH103**

BH102: How much time did you usually spend doing **vigorous** physical activities on one of those days?

_____ hours per day (0 ...10)
_____ minutes per day

98. DK/NOT SURE
99. RF

BH103: Think about all the **moderate** activities that you did in the **last 7 days**. Moderate activities refer to activities that take moderate physical effort and make you breathe somewhat harder than normal. Think *only* about those physical activities that you did for at least 10 minutes at a time. During the **last 7 days**, on how many days did you do **moderate** physical activities like carrying light loads, bicycling at a regular pace, or doubles tennis? Do not include walking.

1. _____ days per week
 2. No I have not done any moderate physical activities **GO TO BH105**
98. DK **GO TO BH105**
99. RF **GO TO BH105**

BH104: How much time did you usually spend doing **moderate** physical activities on one of those days?

_____ hours per day (0 ...10)
_____ minutes per day

98. DK/NOT SURE
99. RF

BH105: Now think about the time you spent **walking** in the **last 7 days**. This includes at work and at home, walking to travel from place to place, and any other walking that you might do solely for recreation, sport, exercise, or leisure.

During the last 7 days, on how many days did you walk for at least 10 minutes at a time?

1. _____ days per week

2. No I have not done any walking **GO TO BH107**

98. DK **GO TO BH107**

99. RF **GO TO BH107**

BH106: How much time did you usually spend **walking** on one of those days?

_____ hours per day (0 ...5)

_____ minutes per day

98. DK/NOT SURE

99. RF

BH107: The last question is about the time you spent **sitting** on weekdays during the **last 7 days**. Include time spent at work, at home, while doing course work and during leisure time. This may include time spent sitting at a desk, visiting friends, reading, or sitting or lying down to watch television. During the **last 7 days**, how much time (per day) did you spend **sitting** (sitting includes driving) on a week day?

(This question is looking for the usual number of hours spent sitting on a typical week day. If respondent has difficulty calculating, interviewer may suggest they approximate by subtracting time spent sleeping, walking, standing, exercising etc. from the 24 hours)

_____ hours per day (0 ...20)

_____ minutes per day

98. DK/NOT SURE

99. RF

BH108: What do you think is the recommended amount of physical activity needed for a healthy lifestyle? This includes all types of physical activity, including sport, housework, DIY or gardening.

1. 30 minutes per week

2. 60 minutes per week

3. 90 minutes per week

4. 120 minutes per week

5. 150 minutes per week

6. 180 minutes per week

7. 210 minutes per week

96. Other (specify) – KEEP UNITS IN “minutes per week”

98. DK/NOT SURE

99. RF

Alcohol

The study aims to evaluate the mean weekly alcohol consumption by assessing the different types of beverage consumed (wine, beer, cider etc.) and the alcohol content (% alcohol by volume) for each day in the previous week, or in a "usual" week if this was atypical (should be a reasonable estimation of the mean consumption for the year preceding the examination). It is evaluated during an interview. For each day of the week, the interview should follow the course of a typical day, and should concern the meals and possible intakes between meals, as follows:

- Before breakfast
- Breakfast
- Morning
- Lunch
- Afternoon
- Dinner
- Evening
- Night

The interview should follow the scheme of the table below where the "DAY" column is meant for the evaluation of alcohol intake on each day of the week, and a series of columns each correspond to a particular type of beverage. The alcoholic beverages consumed are expressed in current units of consumption, with a current unit corresponding to a common measure for each type of beverage (e.g. a glass of wine, a pint of beer etc).

In the case of unusual units, one should convert them to usual ones, i.e. this number is not necessarily an integer. In case of exceptional consumption with a frequency greater than a week (e.g. a dose of strong alcohol once a fortnight), one should bring that dose back to a weekly one (e.g. it would be equal to half a dose of strong alcohol once a week).

I'm now going to ask you a few questions about what you drink - that is if you do drink.

BHA1: Do you ever drink alcohol nowadays, including drinks you brew or make at home?

-
- | | |
|--------|------------------------|
| 1. Yes | -> GO TO BHA02 |
| 2. No | -> GO TO BHA01a |
| 99. RF | -> GO TO BHA01a |

BHA01a: Could I just check, does that mean you never have an alcoholic drink nowadays, or do you have an alcoholic drink very occasionally, perhaps for medicinal purposes or on special occasions like Christmas or New Year?

- | | |
|----------------------|------------------------|
| 1. Very occasionally | -> GO TO BHA02 |
| 2. Never | -> GO TO BHA01b |
| 99. RF | |

BHA01b: Have you always been a non-drinker, or did you stop drinking for some reason?

- 1. Always a non-drinker -> **GO TO BHA01c**
- 2. Used to drink but stopped -> **GO TO BHA01d**
- 99. RF

BHA01c: What would you say is the MAIN reason you have always been a non-drinker?

- 1. Religious reasons
- 2. Don't like it
- 3. Parent's advice/influence
- 4. Health reasons
- 5. Can't afford it
- 6. Other
- 99. RF

GO TO BH201

BHA01d: What would you say is the MAIN reason you stopped drinking?

- 1. Religious reasons
- 2. Don't like it
- 3. Parent's advice/influence
- 4. Health reasons
- 5. Can't afford it
- 6. Other
- 99. RF

GO TO BHA03

BHA02: I'm going to read out a few descriptions about the amounts of alcohol people drink, and I'd like you to say which one fits you best. Would you say you:

- 1. hardly drink at all
- 2. drink a little
- 3. drink a moderate amount
- 4. drink quite a lot
- 5. or drink heavily?
- 99. RF

BHA03: At what age did regular alcohol consumption begin?

Arbitrarily, regular consumption is defined by the intake of at least 3 usual amounts per week, for a period of at least 3 consecutive months, whatever the type of beverage consumed. Record even if the consumption period was short (by definition, a minimum of 3 months) whatever the level of intake, including a subsequent complete abstinence from alcohol.

_____ age (4...[R's age])

96. NEVER REGULARLY CONSUMED ALCOHOL

98. DK/NOT SURE

99. RF

IF (BHA1 = 1 OR BHA01B = 2 OR BHA01A = 1) ASK BHA04 OTHERS GO TO BH201

BHA04: For how long did you consume alcohol?

This is the approximate duration of the present consumption period i.e. at least one year. This duration may vary but should, at most, be equal to the time elapsed since age at onset of regular consumption and present age, provided the participant's intake has not varied too much with time. Round up the number of years, if necessary.

_____ years ([R's age – BHA03])

98. DK/NOT SURE

99. RF

Coding:

- The variables recorded in the data files will correspond to the daily wine, cider, spirits, and liqueurs intake.
- They will be indexed from the association of the mnemonics located in the margins e.g. the consumption of wine on a Monday will be indexed WINEMO, that of Tuesday WINETU, etc).
- The data thus recorded will be measured in ml of alcohol (e.g. a 12% wine contains 12% alcohol, e.g. 175ml glass of wine = 21ml of alcohol; 1 pint {568ml} of 4.5% beer = 25.6ml of alcohol).

**ASK THE FOLLOWING QUESTIONS IF BHA1 = 1 OR BHA01a = 1
OTHERS GO TO BH201**

I am going to ask you some questions about your drinking pattern over the past week or a usual week if it was atypical. In the case of unusual units, one should convert them to usual ones. In case of exceptional consumption with a frequency greater than a week (e.g. a dose of strong alcohol once a fortnight), one should bring that dose back to a weekly one (e.g. it would be equal to half a dose of strong alcohol once a week).

ALCD001 – ALCD007: Now thinking about a typical week's drinking, do you normally drink on a <insert day>?

ALCDR11 – ALCDR77: What types of drinks do you have on those days? MULTI-CODE

1. Wine / Sherry
2. Cider
3. Lager
4. Stout
5. Ale
6. Alcopops
7. Spirits
8. Liqueurs

ALCD111 – ALCD779: How much <drink type> do you have on a typical <insert day>?
INTERVIEWER: Record amount here then units in the next question

Please confirm unit of measure of <drink type>

FOR WINE

1. Small glass (125 ml)
2. Medium glass (175 mls)
3. Half a bottle of wine (375 mls – 3 small glasses)
4. Full bottle of wine (750 mls – 6 small glasses)

FOR CIDER, LAGER, STOUT, ALE, ALCOPOPS

1. Small bottle (330 mls)
2. Half pint (284 mls)
3. Pint (568 mls)
4. Can (440 mls)
5. Bottle (500 mls)

FOR SPIRITS / LIQUEURS

1. Standard spirit measure (35 mls)
2. Standard liqueur measure (50 mls)
3. Half bottle (350 mls)
4. Full bottle (700 mls)
5. Full bottle (1 litre)

Day	Wine**		Cider		Beer								Spirits e.g. vodka, gin, rum, brandy, whiskey etc	Liqueurs e.g. Irish cream, coffee, liqueur etc
					Lager			Stout			Ale			
	small glass	medium glass	Small bottle	Pint*	Can	Bottle	Pint*	Can	Bottle	Pint*	Bottle	Pint*	Measure	Measure
	125ml	175ml	330ml	568ml	440ml	330ml	568ml	440ml	330ml	568ml	500ml	568ml	35ml	50ml
Monday														
Tuesday														
Wednesday														
Thursday														
Friday														
Saturday														
Sunday														

Instructions for interviewer:

* Half pint = 284ml size; e.g. ml of alcohol per half pint of 4.5% lager = 12.8ml

** 1 bottle of wine = 750ml (6 small glasses); half bottle of wine = 375ml (3 small glasses)

Sleep section

INTRO: We are interested in how well people manage to sleep at night and if they have any trouble sleeping.

BH201: How likely are you to doze off or fall asleep during the day?

1. Would never doze
2. Slight chance of dozing
3. Moderate chance of dozing
4. High chance of dozing
98. DK
99. RF

BH202: How often in the past month did you have trouble falling asleep?

1. None at all
2. 1-3 days
3. 4-7 days
- 4.. 8-14 days
- 5.. 15-21 days
6. 22-31 days
98. DK
99. RF

BH203: How often in the past month have you had trouble waking up too early and not being able to fall asleep again?

1. None at all
2. 1-3 days
3. 4-7 days
- 4.. 8-14 days
- 5.. 15-21 days
6. 22-31 days
98. DK
99. RF

BH203b: How often in the past month did you wake up several times per night?

1. None at all
2. 1-3 days
3. 4-7 days
4. 8-14 days
5. 15-21 days
6. 22-31 days
98. DK
99. RF

BH203c: *How often in the past month did you have trouble staying asleep (including waking far too early)?*

1. None at all
2. 1-3 days
3. 4-7 days
- 4.. 8-14 days
- 5.. 15-21 days
6. 22-31 days
98. DK
99. RF

BH203d: *How often in the past month did you wake up after your usual amount of sleep feeling tired and worn out?*

1. None at all
2. 1-3 days
3. 4-7 days
4. 8-14 days
5. 15-21 days
6. 22-31 days
98. DK
99. RF

BH203e: *Do you take any medication (over the counter or prescribed) to help you Sleep?*

1. Yes
2. No
98. Don't know
99. Refused to answer

BH203f: *How many hours of sleep do you have on an average weeknight?*

1. X hours X minutes (1 hour thru 15 hours)
98. Don't know
99. Refused to answer/

BH204: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION BH?

- 1. NEVER**
- 2. A FEW TIMES**
- 3. MOST OR ALL TIMES**

SECTION 11: MEDICATIONS (MD)

MD001a: Can you tell me the name of your usual General Practitioner?

Text: up to 60 characters

98. DK

99. RF

MD001: Now I would like to record all medications that you take on a regular basis, like every day or every week. This will include prescription and non-prescription medications, over-the-counter medicines, vitamins, and herbal and alternative medicines.

ASK RESPONDENT IF YOU COULD SEE THE MEDICATIONS HE/SHE TAKES SO YOU CAN COPY DOWN THE CORRECT SPELLING OF EACH TABLET.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

PROMPT: DO I HAVE ALL OF YOUR MEDICATIONS HERE?

MD101: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION MD?

- 1. NEVER**
- 2. A FEW TIMES**
- 3. MOST OR ALL TIMES**

IF WE001=1 (RETIRED) – GO TO NEXT SECTION

IF WE001= 5, 6, 95, 98, 99 (SICK, FAMILY, OTHER, DK, REFUSED) – GO TO WR301

SECTION 14: WORK AND PENSIONS (WP)

(formerly Planning for Retirement (WR))

ASK ALL

DUMMY QUESTIONS TO BE CREATED HERE FOR WAVE 1

NPFFW is the number of pensions fed forward – set to 0 for Wave 1

WPES

1. Employee (built from WE001 = 2 or WE003 = 1)
2. Self-employed (built from WE001 = 3)

PPREVNEW

1. New (default value for Wave 1)
2. Previous

WPPREV

1. Yes
2. No
3. Not applicable (default value for Wave 1)

WPFFNAME – string variable – (set to blank for Wave 1)

WPFFCURP

1. Current
2. Past
3. Not applicable (default value for Wave 1)

WPFFDCDB – set to blank for Wave 1

WPSRUL

1. Yes
2. No (default value for Wave 1)
3. AFTER CAPI PROMPT: Yes, scheme rules have changed

WPFFYBS - set to blank for Wave 1

WPFFCONS- set to blank for Wave 1

WPFFPENT - set to blank for Wave 1

WPFFRECP – set to blank for Wave 1

*DUMMY QUESTIONS TO BE CREATED HERE FOR WAVE 1*WPACTW

1. Paid work (*built from WE001 = 2 or 3 or WE003 = 1*)
2. Temporarily away
3. Waiting to start work
4. No work (otherwise set to code 4 for Wave 1)

WPDES

- 1 Retired (*built from WE001 = 1*)
- 2 Employed (*built from WE001 = 2 or WE003 = 1*)
- 3 Self-employed (*built from WE001 = 3*)
- 4 Unemployed (*built from WE001 = 4*)
- 5 Permanently sick or disabled (*built from WE001 = 5*)
- 6 Looking after home or family (*built from WE001 = 6*)
- 95 Other (SPECIFY)
- 96 SPONTANEOUS : Semi-retired

IF (NPFFW = 0) OR (NPFFW <> RESPONSE)

If WPES = (1) Employee

WPBPS

Does your current employer offer a pension scheme which you are entitled to join?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

If WPBPS = (1) Yes

WPPS

Are you a member of this pension scheme?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

END FILTER

END FILTER

If (WPBPS <> (1) Yes) OR (WPPS <> (1) 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
- 5 No
- 98 DK
- 99 RF

END FILTER

END FILTER

[The following set of questions relate to private pensions. These variables are saved in the separate pension-level dataset]

LOOP for each pension indicated at WPMORE, WPMOREPC, WPPS or WPPSPC

WPBPSTMP

- 1. Yes
- 2. No

Derivation of WPBPSTMP:

IF (NPFFW = 0 OR NPFFW <> RESPONSE) AND WPBPS = (1) Yes THEN
 WPBPSTMP := (1) Yes
 IF (NPFFW = 0 OR NPFFW <> RESPONSE) AND WPBPS <> Yes THEN
 WPBPSTMP := (2) No
 IF WPES = (2) SelfEmp THEN WPBPSTMP := (2) No
 ELSE WPBPSTMP := EMPTY

Ask all | SET WPPENT = (1) FOR FIRST PENSION ONLY If WPPS = (1)

WPPENT

What type of pension is this? **SHOW CARD E1**

- 1 Employer Pension
- 2 Private Personal Pension
- 3 Group Personal Pension
- 4 Stakeholder Pension
- 5 S226 Plan
- 6 Retirement Annuity pensions (pre 1986 PPPs)
- 95 Other retirement saving scheme

END FILTER

IF (PPREVNEW = (1) 'New') OR (WPPREV = (1) Yes AND WPFFNAME <> RESPONSE

WPNAME

Can I just check, what is the name of this pension scheme?
 String: 80

END FILTER

WPCURR

IF (WPES = Employee) Do you or your employer currently contribute to this pension?

IF (WPES <> Employee) Are you currently contributing or could you still contribute to this pension?

- 1 Yes
- 5 No
- 98 Don't know
- 99 Refused

END FILTER

IF (WPCURR = 1) SET WPREC = 2

WPREC

Are you receiving a pension from this scheme?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

Set WPCURP = WPCURR

IF (WPPENT = (1) EMPLPS) AND (WPCURR = (1) Yes) AND ((PPREVNEW = (1) 'New') OR ((WPFFDCDB <> RESPONSE) AND (WPCURP = (1) Current)) OR (WPSRUL = (1) Yes))

WPDPS

Is your pension scheme more like Type A or Type B? **SHOW CARD E2**

INTERVIEWER: Type A is sometimes called defined contribution or money purchase, type B is sometimes called defined benefit.

- 1 Type A: My pension contributions are put into a fund which grows over time and

my

pension will depend on the size of this fund when I retire (DC)

- 2 Type B: My pension will be based on a formula involving age, years of service and salary (DB)

- 3 Don't know

END FILTER

WPDCDB = WPDPS

IF WPCURR = (1) Yes AND ((WPSRUL = 1 OR (WPPENT = (1) EMPLPS AND (PPREVNEW = (1) 'New' OR WPFFDCDB <> RESPONSE))) OR (WPPENT <> (1) EMPLPS AND WPCURP = 2)

WPCOS

Is it a contracted out scheme (this means you pay lower National Insurance Contributions and give up your entitlement to the State Second Pension scheme)?

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

END FILTER

IF (PPREVNEW = (1) 'New' AND WPPENT = (1) EMPLPS AND WPCURR = 1) OR
WPSRUL = 1

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 WPNRA = 3, 1

WPBTHA

What is the normal retirement age?

Range: 40..90

-98: Don't know

-99: Refused

END FILTER

If WPNRA = 3, 2

WPBTHP

What is the period of service?

Range: 0..60

-98: Don't know

-99: Refused

END FILTER

If WPNRA = 3, 1

WPERA

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

- 1 Yes
- 2 No
- 3 Occasionally
- 98 DK
- 99 RF

END FILTER

If WPERA = 1, 3 OR WPNRA = 2, 4, 5

WPYAER

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

Range: 30..[WPBTHA]

-98: Don't know

|| -99: Refused

END FILTER

If WPDCDB = (2) DB

WPDESP

SHOW CARD E3

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

CODE ONE ONLY.

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

If WPDESP = 4

WPODP

INTERVIEWER: Write in other way.

String: 70

END FILTER

IF 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 WPFSAP = 3

WPFSAL

INTERVIEWER: Enter other fraction.

String: 10

END FILTER

END FILTER

END FILTER

END FILTER

IF (PPREVNEW = (1) 'New' OR WPSRUL = 1 OR WPFDCDB <> RESPONSE) AND
WPCDCB = (2) 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 WPPLP = 1

WPPLPH

Will this be ... READ OUT ...

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

END FILTER

END FILTER

IF WPCDCB = DB

WPLUMP

What size lump sum do you expect to receive when you retire?

Range: 0..9999997

-98 Don't know

-99 Refused |

If (WPLUMP = (-98) DONTKNOW) OR (WPLUMP = (-99) REFUSAL)

WPLUMPB

Would it be.....

BRACKETS (5000, 15000, 50000, 200000)

[Bracket results are recorded in WpLuml, WpLumu, WpLume, WpLumr]

END FILTER

WPPTP

How much do you expect to get from this pension?

INTERVIEWER: If asked: in today's prices.

Code how answer is given.

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

| *If WPPTP = 1*

| **WPPSAL**

| INTERVIEWER: Enter percentage of salary.

| Range: 1..100

| -98 Don't know

| -99 Refused |

END FILTER

| *IF WPPTP = 2*

|

| **WPASAL**

| INTERVIEWER: Enter amount.

| Range: 0..999997

| -98 Don't know

| -99 Refused |

END FILTER

| *IF WPASAL = (-98 or -99) NONRESPONSE OR WPPTP = (9) NONRESPONSE*

| **WPASALB**

| Would it be.....

| BRACKETS (2500, 5000, 12500, 50000)

| **[Bracket results are recorded in WPASL, WPASU, WPASE, WPASR]**

END FILTER

END FILTER

IF WPSRUL = (1) Yes OR (PPREVNEW = (1) 'New' AND WPCURP = (1) Current) OR (WPFFYBS <> RESPONSE AND WPCURP = (1) Current)

WPYBS

How many years have you had this pension?

Range: 0..60

-98 Don't know

-99 Refused

END FILTER

IF WPPENT = (1) EMPLPS AND WPCURP = (1) Current AND WPES = (1) Employee

WPERC

Does your employer require you to make a contribution to your pension scheme?

1 Yes

2 No

3 Don't know

If 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 WPMC = (1) Amount

WPMCA

INTERVIEWER: Enter amount.

Range: 0..9997

-98 Don't know

-99 Refused

WPPERCWhat period does this cover? **SHOW CARD E4**

- 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 FILTER

*If WPMC = (2) FRACCSAL***WPMFRAC**

INTERVIEWER: Enter percentage of salary.

Range: 0..100

-98 Don't know

-99 Refused

END FILTER

END FILTER

IF WPERC = 1

IF WPDCDB = (2) DB

WPACON

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

READ OUT ...

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

IF WPACON = 2

WPADY

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

Range: 0..10

-98 Don't know

-99 Refused

END FILTER

END FILTER

IF WPDCDB = (1) DC

WPMMIN

Do you usually contribute more than the minimum contribution?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

END FILTER

IF WPACON = 1 OR WPMMIN = 1

WPACOA

[IF WPACON = 1] How much do you usually contribute through AVCs?

[IF WPMMIN = 1] How much are your usual additional contributions?

INTERVIEWER: Code how answer is given.

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

IF WPACOA = 1

WPACOB

INTERVIEWER: Enter amount.

Range: 1..99997

-98 Don't know

-99 Refused

WPACOCWhat period does this cover? **SHOW CARD E4**

- 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 FILTER

*IF WPACOA = 2***WPFRAS**

INTERVIEWER: Enter percentage of salary.

Range: 1..100

-98 Don't know

-99 Refused

END FILTER

END FILTER

*IF WPACON = 3***WPCONY**

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

INTERVIEWER: Enter amount.

Range: 1..99997

-98 Don't know

-99 Refused

END FILTER

END FILTER

END FILTER

IF WPERC = 2, 3 OR ((WPPENT = 2, 3, 4, 5, 6, 95) AND WPCURP = (1) Current)

WPPCONT

Not including any National Insurance Contributions paid into the pension, do you contribute to your pension ... READ OUT ...

- 1 ... never,
- 2 regularly,
- 3 irregularly,
- 4 or, have you stopped contributing to your scheme?
- 98 DK
- 99 RF

IF WPPCONT = 2

WPYCAMT

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 WPYCAMT = 1

WPYCA

INTERVIEWER: Enter amount.

Range: 1..99997

- 98 Don't know
- 99 Refused

WPMCAF

What period does this cover? **SHOW CARD E4**

- 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 FILTER

IF WPYCAMT = 2

WPYFRAC

INTERVIEWER: Enter percentage of salary.

Range: 1..100

-98 Don't know

-99 Refused

END FILTER

END FILTER

IF WPPCONT = 3, 4

WPLCOY

When did you last make a contribution?

INTERVIEWER: Enter year at this question.

Range: [Birth year + 10]...[current year]

-98: Don't know

-99: Refused

IF (WPLCOY = RESPONSE (>0))

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 FILTER

IF WPLCOY >= 2005

WPNIRR

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

Range: 0..60

-98 Don't know

-99 Refused

END FILTER

IF WPNIRR > 0 ASK WPMCON

WPMCON

[if WPNIRR = 1] About how much did you contribute on that occasion?

[if WPNIRR > 1] About how much did you contribute in the last 12 months?

INTERVIEWER: Code how answer is given.

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

IF WPMCON = 1

WPAC

INTERVIEWER: Enter amount.

Range: 1..99997

- 98 Don't know
- 99 Refused

END FILTER

IF WPMCON = 2

WPFSC

INTERVIEWER: Enter percentage of salary.

Range: 1..100

- 98 Don't know
- 99 Refused

END FILTER

END FILTER

IF WPPCONT = 4

WPRCON

Did you previously contribute regularly to this pension?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

IF WPRCON = (1) Yes

WPRSC

Why did you stop contributing to this Personal Pension?

CODE ALL THAT APPLY.

- 1 Moved job and joined employer's pension scheme [wprcmo]
- 2 Rejoined employer's pension scheme in existing job [wprcre]
- 3 Rejoined State Earnings Related Pension Scheme [wprcst]
- 4 Worried about risks [wprcri]
- 5 Worried about publicity concerning personal pensions [wprcpu]
- 6 Because of own illness/disability [wprcmoh]
- 7 Stopped work/unemployed [wprcmun]
- 8 Could not afford it [wprcmaf]
- 9 Changed jobs and not known whether joined new scheme [wprcmnk]
- 95 Other (specify) [wprc95]

IF WPRSC = 95

WPRSCO

INTERVIEWER: Enter other reason.

String: 20

[Open responses to WprSCO are coded and merged with the multiple responses to Wprsc in variable Wprcmmo-Wprcm86]

END FILTER

END FILTER

END FILTER

END FILTER

IF WPPENT <> (5) S226P AND WPES = (1) Employee AND WPCURP = (1) Current

WPCEMP

Does your employer contribute to this pension?

- 1 Yes - regularly
- 2 Yes - irregularly
- 5 No
- 98 DK
- 99 RF

IF WPCEMP = 2

WPECPP

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

- 1 Amount
- 2 Percentage of salary

IF WPECPP = 1

WPAECP

INTERVIEWER: Enter amount.

Range: 1..99997

- 98 Don't know
- 99 Refused

IF WPAECP = RESPONSE

WPEPERI

What period does that cover? **SHOW CARD E4**

- 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 FILTER

END FILTER

IF WPECPP = 2

WPFSEC

INTERVIEWER: Enter percentage of salary.

Range: 1..100

- 98 Don't know
- 99 Refused

END FILTER

END FILTER

IF 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 WPMEC = 1

WPAMEC

INTERVIEWER: Enter amount.

Range: 1..99997

- 98 Don't know
- 99 Refused

IF WPAMEC = RESPONSE

WPFSCP

What period does that cover? **SHOW CARD E4**

- 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 FILTER

END FILTER

IF WPMEC = 2, 3

WPFSCO

INTERVIEWER: Enter percentage of salary or contribution.

Range: 1..100

- 98 Don't know
- 99 Refused

END FILTER

END FILTER

END FILTER

IF WPCDCB = (2) DB AND WPCURP = (1) Current

WPFSAV

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

- 1 Yes
- 5 No
- 98 DK
- 99 RF

IF WPFSAV = 1

WPPFVAL

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

Range: 0..9999997

-98: DK

-99: RF

IF WPPFVAL = (-98) DONTKNOW OR WPPFVAL = (-99) REFUSAL

WpPFValb

Would it amount to.....

BRACKETS (2500, 7500, 25000, 100000)

[Bracket results are recorded in WpPFvl, WpPFvu, WpPFve, WpPFvr]

END FILTER

END FILTER

END FILTER

IF WPCURR = (1) Yes AND ((WPPENT = (1) EMPLPS AND WPCDCB = (1) DC) OR
(WPPENT = 2, 3, 4, 5, 6, 95) AND WPCURP = (1) Current))

WPAPF

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

Range: 0..9999997

-98: DK

-99: RF

IF (WPAPF = (-98) DONTKNOW) OR (WPAPF = (-99) REFUSAL)

WpAPFb

Is it.....

BRACKETS (2500, 7500, 25000, 100000)

[Bracket results are recorded in WPAPFL, WPAPFU, WPAPFE, WPAPFR]

END 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 WPPTOP = 1, 2

WPPENB

INTERVIEWER: Enter amount.

Range: 0..9999997

-98: DK

-99: RF

```
IF (WPPENB = (-98) DONTKNOW) OR (WPPENB = (-99) REFUSAL)
  IF WPPTOP = 1
    WpPenTB
    Would it be.....
    BRACKETS (5000, 15000, 50000, 150000)
    [Bracket results are recorded in WpPetl, WpPetu, WpPete, WpPetr]
  END FILTER
  IF WPPTOP = 2
    WpPenAB
    Would it be.....
    BRACKETS (2500, 5000, 12500, 50000)
    [Bracket results are recorded in WPPEAL, WPPEAU, WPPEAE, WPPEAR]
  END FILTER
END FILTER
END FILTER
END FILTER
END FILTER
END FILTER

IF WPPENT = (1) EMPLPS AND WPCURP = (1) Current AND WPFCONS <>
RESPONSE
  WPCONS
  We may wish to contact your employer to find out more about the rules of their
  pension scheme. Would you be willing to give us their name and address for this
  purpose?
  1 Employer's name and address given
  2 Employer's name and address not given

  IF WPCONS = 1
    WPEADD
    INTERVIEWER: Enter employer's name and address.
    String: 80
  END FILTER
END FILTER
```


IF (WPPENT = (1) EMPLPS AND PPREVNEW = (1) 'New' AND WPCURP = 2) OR
(WPPFPENT = (1) EMPLPS AND WPCURP = Past AND WPPFDCDB <> RESPONSE)

WPDSP

Is your pension scheme more like Type A or Type B? **SHOW CARD E5**

INTERVIEWER: Type A is sometimes called defined contribution or money purchase, type B is sometimes called defined benefit.

- 1 Type A: My pension contributions were put into a fund which grew over time and the pension depended on the size of this fund when I retired (DC)
- 2 Type B: My pension is based on a formula involving age, years of service and salary (DB)
- 3 Don't know

PERCH

Did your employer require you to make a contribution to your pension scheme?

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

END FILTER

IF WPCURP = 2 |

IF PPREVNEW = (1) 'New' AND WPREC = (2) No

WADS

Between what dates (approximately) did you belong to this scheme? [start year]

INTERVIEWER: Enter year started.

Range: [Birth year + 10]...[current year]

- 98 Don't know
- 99 Refused

WADE

(Between what dates (approximately) did you belong to this scheme?) [end year]

INTERVIEWER: Enter year stopped.

Range: [Birth year + 10]...[current year]

- 98 Don't know
- 99 Refused

END FILTER

IF (WPREC = (1) Yes)

WIPING

Is the amount you receive from this pension continually adjusted to take account of inflation (sometimes called index-linked)?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

WPPAY

Thinking about the last payment you received, what period did this cover? **SHOW CARD E4**

- 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 WPPAY = RESPONSE

WPPYR

How much did you receive?

Range: 0..999997

- 98 Don't know
- 99 Refused

IF WPPYR <> RESPONSE

IF WPPAY = 1

WPWB

Was it.....

BRACKETS (25, 75, 150, 600)

[Bracket results are recorded in WppyWI, WppyWu, WppyWe, WPPYWR]

END FILTER

IF WPPAY = 2

WPFB

Was it.....

BRACKETS (50, 150, 300, 1200)

[Bracket results are recorded in WPPYFL, WPPYFU, WPPYFE, WPPYFR]

END FILTER

IF WPPAY = 4, 5

WPMB

Was it.....

BRACKETS (100, 300, 600, 2500)

[Bracket results are recorded in WPPYML, WPPYMU, WPPYME, WPPYMR]

END FILTER

IF WPPAY = 52, 95

WPYB

Was it.....

BRACKETS (1500, 4000, 8000, 30000)

[Bracket results are recorded in WPPYYL, WPPYYU, WPPYYE, WPPYYR]

END FILTER

IF WpPay <> 1, 2, 4, 5, 52, 95

WPOB

Was it.....

BRACKETS (100, 300, 600, 2500)

[Bracket results are recorded in WPPYOL, WPPYOU, WPPYOE, WPPYOR]

END FILTER

END FILTER

END FILTER

WPTAX

Is this before or after tax?

- 1 Before tax
- 2 After tax
- 3 (SPONTANEOUS: Not liable for tax)
- 98 Don't know

IF WPES = (1) Employee AND WPPENT = (1) EMPLPS

WPNEW

Changes introduced in April 2006 mean that it is now possible to be paid a pension by an employer whilst you continue to work for them. Is this pension that you are currently receiving paid for you by your current employer?

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

END FILTER

END FILTER

IF (WPREC = (1) Yes AND (WPFFCURP <> (2) Past OR WPFFRECP <> Receiving))

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
- 5 No
- 98 DK
- 99 RF

IF WPLUMPS = 1

WPLUMPA

How much was the lump sum?

INTERVIEWER: Enter pounds.

Range: 1..999997

- 98 Don't know
- 99 Refused

IF WPLUMPA = NONRESPONSE

WPLMPAB

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in WPLUAL, WPLUAU, WPLUAE, WPLUAR]

END FILTER

END FILTER

IF (WPPENT<> 1 (EMPLPS)) ASK WPTAKEP

WPTAKEP

Have you taken your pension as ... READ OUT ...

- 1 ... Annuity with pension company who originally provided the scheme,
- 2 ... Annuity with a different pension provider,
- 3 or, Income drawdown?
- 98 DK
- 99 RF

IF WPTAKEP = 3

WPINCD

How much have you withdrawn annually from your pension?

INTERVIEWER: Enter pounds.

Range: 0..99997

- 98 Don't know
- 99 Refused

END FILTER

1 No information [wpifsno] – EXCLUSIVE CODE

END FILTER

1

IF WPBPSTMP = EMPTY AND WPES = (1) Employee AND NPFFW > 0

WPBPSPC

Does your current employer offer a pension scheme which you are entitled to join?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

IF WPBPSPC = 1

WPPSPC

Are you a member of this pension scheme?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

END FILTER

END FILTER

IF 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 FILTER

END FILTER

IF (INP < NPFFW OR WPPSPC = 1 OR WPMOREPC = 1) repeat questions WPPENT to WPMOREPC for next pension.

[The remaining questions in this module are available in the main individual-level core dataset]

IF WPES = (1) Employee

IF WPBPS = 5

WPANYP

You said that your employer did not offer you a pension scheme. Does your employer offer a pension scheme to any employees?

- 1 Yes
- 5 No
- 98 DK
- 99 RF

END FILTER

IF WPPS = 5

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
- 5 Already have another pension
- 6 Age means it's too late now/too old so not worth it
- 7 Only work reduced hours/part time so not worth it
- 8 Did not like/understand scheme offered
- 95 Other reason (SPECIFY)

[code maximum 5 out of 5 possible responses]

[Responses to Wpact are recorded in variables Wpps1-Wpps95: each of these binary variables relates to one of the different binary response categories available]

IF WPPSM = 95

WPPSMO

INTERVIEWER : Write in other answer.

String: 40

END FILTER

IF 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 WPEC = 1

WPECA

Would this be ...READ OUT...

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

END FILTER

END FILTER

END FILTER

END FILTER

IF CS006 = 4,5,6

WPEXW

Some people receive pensions from schemes which their previous husband, wife or civil partner contributed to.

Do you expect to receive a pension from any scheme like this in the future?

Please do not include any pensions you are already receiving an income from.

- 1 Yes
- 2 No

IF WPEXW = (1) 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 WPSPoup = RESPONSE

WPSPou

How much do you expect to receive from schemes like this in the future?

Enter amount

Range: 0..999997

- 98 Don't know
- 99 Refused

END FILTER

END FILTER

END FILTER

IF (WPREC(any pension) = (2) No)

MANINT

There may be a lot of uncertainty about how much income you will receive from your pensions in the future, for example because of changes made by your pension providers or changes to government pension policy. But many people still have some idea of the lowest and highest income they could possibly get.

WPMPAH

If you added together your expected income from any occupational or personal pensions, but not your state pension, what is the **most** income you could expect to receive at state pension age in the best case scenario?

If unsure, please think of a yearly figure.

INTERVIEWER: Enter amount at this question, period at the next.

Round to the nearest £.

Range: 0..999997

-98 Don't know

-99 Refused

WPMANPP

INTERVIEWER: Code period at this question. **SHOW CARD E4**

- 01 One week
- 02 Two Weeks
- 03 Three Weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three Months
- 26 Six Months
- 52 One year
- 90 Less than a week
- 95 One off/lump sum
- 96 Other (EXPLAIN IN A NOTE)

WPMALA

If you added together your expected income from any occupational or personal pensions, but not your state pension, what is the **least** income you could expect to receive at state pension age in the worst case scenario?

INTERVIEWER: Enter amount.

Round to the nearest £.

If the respondent is sure about their future pension payment, enter the same amount again.

Range: 0..[value at WPMPAH] 999997

-98 Don't know

-99 Refused

[n.b. the textfill wp1q is randomly selected, and WP2Q and WP3Q go up in value. The period (per | week, month etc) matches the period that the respondent chose to describe their total pension | value in wpmannpp]

IF (WPMPAH-WPMALA) > 0 continue otherwise go to WPSPINT
IF expected pension income range (WPMPAH-WPMALA) split into at least 2 ranges
[WPQN >= 2]

WPMFQ

What are the chances that you will receive more than £[^WP1Q] per [^week/four weeks/month/year]? **SHOW CARD E6**

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

-98 Don't know

-99 Refused

END FILTER

IF expected pension income range (WPMPAH-WPMALA) split into at least 3 ranges
[WPQN >= 3]

WPMSQ

What are the chances that you will receive more than £[^WP2Q] per [^week/four weeks/month/year]? **SHOW CARD E6**

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..[WPMFQ]

-98 Don't know

-99 Refused

END FILTER

IF expected pension income range (WPMPAH-WPMALA) split into 4 ranges [WPQN >= 4]

WPMTQ

What are the chances that you will receive more than £[^WP3Q] per [^week/four weeks/month/year]? **SHOW CARD E6**

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..[WPMSQ]

-98 Don't know

-99 Refused

END FILTER

END FILTER

ONLY ASK OF THOSE WHO ARE UNDER STATE PENSION AGE

IF (GD002 = 1 'Male' & DN003B = 2 to 7) OR (GD002 = 2 'Female' & DN003B = 2 to 6) ASK WPSPINT to WPMSTQ

WPSPINT

There may also be a lot of uncertainty about how much income you will receive from state pensions in the future, for example because of changes to government pension policy. But many people still have some idea of the lowest and highest income they could possibly get.

WPMSAH

If you added together your expected income from state pensions, including those from SERPS/State Second Pensions, what is the most income you could expect to receive at state pension age in the best case scenario?

If unsure, please think of a weekly figure.

INTERVIEWER: Enter amount at this question, period at the next.

Range: 0..999997

-98 Don't know

-99 Refused

WPMANSP

INTERVIEWER: Enter period at this question. **SHOW CARD E4**

- 01 One week
- 02 Two Weeks
- 03 Three Weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two Months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months
- 26 Six months
- 52 One year
- 90 Less than a week
- 95 One off/lump sum
- 96 Other (EXPLAIN IN A NOTE)

WPMSH

If you added together your expected income from state pensions, including those from SERPS/State Second Pensions, what is the least income you could expect to receive at state pension age in the worst case scenario?

INTERVIEWER: Enter amount.

If the respondent is sure about their future pension payment, enter the same amount again.

Range: 0..[value at WPMSAH] 999997

-98 Don't know

-99 Refused

[n.b. the textfill wp1sq is randomly selected, and WP2SQ is higher in value. The period (per week, month etc) matches the period that the respondent chose to describe their total state pension value in wpmansp]

IF (WPMSAH-WPMSH) > 0 continue otherwise go to WPSPD
IF expected pension income range (WPMSAH-WPMSH) split into at least 2 ranges
[WPSN >= 2]

WPMSFQ

What are the chances that you will receive more than £[WP1SQ] per [^week/four weeks/month/year]? **SHOW CARD E6**

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..100

-98 Don't know

-99 Refused

END FILTER

IF expected pension income range (WPMSAH-WPMSH) split into at least 3 ranges
[WPSN >= 3]

WPMSSQ

What are the chances that you will receive more than £[wp2sq] per [^week/four weeks/month/year]? **SHOW CARD E6**

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..[WPMSFQ]

-98 Don't know

-99 Refused

END FILTER

IF expected pension income range (WPMSAH-WPMSH) split into 4 ranges [WPSN >= 4]

WPMSTQ

What are the chances that you will receive more than £[WP3SQ] per [^week/four weeks/month/year]? **SHOW CARD E6**

Please choose a number between 0 and 100, where 0 means that you think there is absolutely no chance this will happen, and 100 means that you think this is absolutely certain to happen.

Range: 0..[WPMSTQ]

-98 Don't know

-99 Refused

END FILTER

WPSPD

[Are you currently receiving any state pension income?

1 Yes

2 No

98. DK

99. RF

IF (WPSPD = (2) No)

WPSPD1a

Is this because...

1 you are not currently entitled to receive any state pension income

2 you are entitled to receive state pension income but have not claimed it yet

98. DK

99. RF

IF (WPSPD1a = (2) NoCla)

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 deferred your state pension?"

1 Yes

5 No

98 DK

99 RF

IF (WPSPD1b = (1) Yes)

WPSPD2

Which are you planning to claim in the future: a lump sum or higher weekly income?"

1 Lump sum payment

2 Higher weekly state pension income

3 Have not decided yet

98 DK

99 RF

```

IF (WpSPD2 = (1) or (2) AND [Lump, Higher])
  WPSPD3
  At what age are you 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 planning to ^[claim/start claiming]
  or the month and year when you plan to ^[claim/start claiming]
  INTERVIEWER: Code how answer is given.
  1 Age given
  2 Month and year given

  IF (WPSPD3 = (1) GAge)
    WPSPD3a
    INTERVIEWER: Enter age at which respondent intends to ^[claim/start claiming]
    Range : [R's age]..120
    -98 Don't know
    -99 Refused

    ELSEIF (WPSPD3 = (2) GMY)
      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 : 2013..2040
      -98 Don't know
      -99 Refused

      END OF FILTER

    END OF FILTER

  END OF FILTER

END OF FILTER

ELSEIF (WPSPD = (1) Yes)
  WPSPD4
  When you reached the state pension age did you...
  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 (WPSPD4 = (2) Defer)

WPSPD5Y

For how long after reaching the state pension age did you defer your state pension?

INTERVIEWER: Enter years.

Range : 0..45

-98 Don't know

-99 Refused

WPSPD5M

For how long after reaching the state pension age did you defer your state pension?

INTERVIEWER: Enter months.

Range : 0..12

-98 Don't know

-99 Refused

WPSPD6

When you did start claiming your state pension did you choose to receive...

1 Lump sum payment

2 Higher weekly state pension income

3 Cannot remember

END OF FILTER

END OF FILTER

WPSPY

Do you know at what age in years and months you did or will reach the State Pension Age?

INTERVIEWER: Enter number of years.

Range: 50..70

-98 Don't know

-99 Refused

WPSPAM

Do you know at what age in years and months that you did or will reach the State Pension age?

INTERVIEWER: Enter number of months.

Range: 0..11

-98 Don't know

-99 Refused

WPSPAW

Were you aware that the State Pension age for women is changing?

1 Yes

2 No

IF WPDES = (1) or (96) ~~IN~~ [Retire, Semi]

WPRAGE

You said earlier that you were [^retired/semi-retired]. At what age did you retire?

INTERVIEWER: Enter age here.

Range: 30..[R's age]

-98 Don't know

-99 Refused

END FILTER

END FILTER

IF (WPES = (1) Employee) AND (WPACTW = (1) #N [paidw, tempaway]) AND (age>=50)

WPEARLY

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

1 Yes

2 No

99 RF

IF WPEARLY = 1

WPERAG

How old were you?

INTERVIEWER: Enter age.

Range: 50..[current age]

-98 Don't know

-99 Refused

END FILTER

END FILTER

IF WPDES (1) or (96) #N [Retire, Semi]

WPERET

Did you take early retirement, that is did you retire before the normal retirement age in your pension scheme or before the compulsory retirement age in your job?

1 Yes

2 No

99 RF

IF WPERET = (1) Yes

WPERP

When you first retired, did you retire on a ...READ OUT...

- 1 ... full pension,
- 2 reduced pension,
- 3 or, no pension?
- 98 DK
- 99 RF

WPREAS

What were your reasons for taking early retirement? **SHOW CARD E7**

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
- 95 Other (specify)
- 96 None of these
- 97 SPONTANEOUS: Does not consider has retired early

[code maximum 14 out of 14 possible responses]

[Responses to wpreas are recorded in variables WPRES1-WPRES97: each of these binary variables relates to one of the binary response categories available]

[Responses to wpreas are recorded in variables:

wpreaoh wprearh wpreare wpreavr wpreafi wpreafa wpreaen
wpreach wpreast wpreadt wpreayo WPREA95 WPREA96 WPREANO

|||

IF (WPREAS = 04) ASK WPNEW1

WPNEW1 – You said that you were offered reasonable financial terms to retire early or take voluntary redundancy, can I ask, were you offered an early retirement incentive from your employer?

- 1. Yes
- 2. No
- DK
- RF

IF (WPNEW1 = 1) ask WE607, OTHERS GO TO WPMREA

WE607: How old were you when you received this incentive?

50... [R age]

- 98. DK
- 99. RF

WE608: What kind of incentive was this?

1. Cash bonus
2. Additional years of service credited
3. Other pension benefits (specify)
95. Other (specify)
98. DK
99. RF

IF (WPREAS = (95) Other)

WPOREA

INTERVIEWER: Write in other reason.

String: 60

[Responses to wporea have been combined with multiple responses to wpreas and recorded in binary variables WPREM1-WPREM97]

[Responses to wporea have been combined with multiple responses to WPREAS and recorded in binary variables:]

WPREAMRH WPREAMRE WPREAMVR WPREAMFI WPREAMFA

WPREAMEN

WPREAMCH WPREAMST WPREAMDT WPREAMYO WPREAM85

WPREAM86

WPREAM96 WPREAMNO

END FILTER

IF WPREAS.CARDINAL > 1

WPMREA

What was your main reason for taking early retirement? **SHOW CARD E7**

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 FILTER

END FILTER

END FILTER

IF WPERET = (2) No OR WPREAS = 97 OR (WPERET <> RESPONSE) AND

WPRRE

What were your reasons for retiring? **SHOW CARD E8**

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
- 95 Other (specify)
- 96 None of these

[code maximum 13 out of 13 possible responses]

[Responses to wprre are recorded in variables wprr1-wprr96: each of these binary variables relates to one of the binary response categories available]

[Responses to WPRRE are recorded in variables:

WPRRAG WPRROH WPRRRH WPRRRE WPRRFI WPRRFA WPRREN
WPRRCH WPRRST WPRRDT WPRRYO WPRR95 WPRR96

IF (WPRRE = (95) Other)

WPORRE

INTERVIEWER: Write in the other reason.

String: 60

[Responses to wporre have been combined with multiple responses to WPRRE and recorded in binary variables WPRRM1-WPRRM96]

[Responses to wporre have been combined with multiple responses to WPRRE and recorded in binary variables]

WPRRMAG WPRRMOH WPRRMRH WPRRMRE WPRRMFI WPRRMFA

WPRRMEN WPRRMCH WPRRMST WPRRMDT WPRRMYO WPRRMLI

WPRRMAF WPRRM85 WPRRM86 WPRRM96

END FILTER

WPMRRE

What was your main reason for retiring? **SHOW CARD E8**

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 FILTER

IF (WPRRE = 1) AND NOT (WPRRE = 4)

WPWKR

Did you have the opportunity to work past retirement age?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

WPX01:

**IWER (CODE WITHOUT ASKING): HOW OFTEN DID R RECEIVE ASSISTANCE
WITH ANSWERS IN SECTION WP?**

- 1. NEVER**
- 2. A FEW TIMES**
- 3. MOST OR ALL TIMES**

SECTION 15: SOCIAL CONNECTEDNESS (CN)

CN002a: In total, how many living children do you have? (including step, foster and adoptive children)

0 ... 20

98. DK

99. RF

BL: IF RESPONDENT HAS NO CHILDREN GO TO CN003

CN002: How many of your children do you feel very close to?

0 ... [CN002a]

98. DK

99. RF

CN006: How often do you have contact with any of your children by telephone, email, Skype, social media or post?

1. Every day

2. Several times per week

3. Several times per month

4. Several times per year

5. Once or twice per year

6. Almost never

98. DK

99. RF

CN003: In general, (apart from your children), how many (other) relatives do you have that you feel close to? (People you feel at ease with, can talk to about private matters, and can call on for help)?

0... 20

98. DK

99. RF

CN007: How often do you have contact with your (other) relatives by telephone, email, Skype, social media or post?

1. Every day

2. Several times per week

3. Several times per month

4. Several times per year

5. Once or twice per year

6. Almost never

98. DK

99. RF

CN004: In general, how many close friends do you have? (People that you feel at ease with, can talk to about private matters, and can call on for help).

0 ... 20

98. DK

99. RF

CN008: How often do you have contact with your close friends by telephone, email, Skype, social media or post?

1. Every day
2. Several times per week
3. Several times per month
4. Several times per year
5. Once or twice per year
6. Almost never
98. DK
99. RF

(QUESTIONS MOVED FROM DEMOGRAPHICS SECTION)

Religion

DNR006: What religious denomination or body do you belong to?

1. No religion
2. Roman Catholic
3. Presbyterian Church in Ireland
4. Church of Ireland
5. Methodist
6. Baptist
7. Free Presbyterian
8. Brethren
9. Other protestant
10. Other Christian
11. Buddhist
12. Hindu
13. Jewish
14. Muslim
15. Sikh
16. Any other religion

GO TO CS006

DM021: About how often do you GO TO religious services?

1. Never/almost never
2. Once or twice a year
3. Every few months
4. Once or twice a month
5. Once a week
6. More than once a week

DM022: How important would you say religion is in your life; is it very important, somewhat important, not too important or not at all important?

1. Very important
2. Somewhat important
3. Not too important
4. Not at all important

DM023: Do you find that you get comfort and strength from religion or not?

1.	Yes
2.	No

CN005:

**IWER (CODE WITHOUT ASKING): HOW OFTEN DID R RECEIVE ASSISTANCE
WITH ANSWERS IN SECTION CN?**

- 1. NEVER**
- 2. A FEW TIMES**
- 3. MOST OR ALL TIMES**

SECTION 16: INCOME AND ASSETS MODULE (IA)

IAASK – Whether partner in the household

1. Yes

2. No

Set to 1 if CM004 = 1 or 2

Set to 2 if CM004 = 3

IF (CS006 = 4 or 5 and CM004 = 3) **READ OUT**

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 on their behalf. Please include any income that is paid directly to social services or to the home they are staying in.

IF (CS004 = 1 & CM004 = 1) add in "wife"

IF (CS004 = 2 & CM004 = 1) add in "husband"

IF (CM004 = 2) add in "partner"

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.

The next questions are about types of income you [and your [^husband / wife / partner]] may receive. We may have asked you [or your [^husband / wife / partner]] some of the details earlier but it is important for us to check that we understand your situation correctly.

1. Continue

2. Refuses to answer about husband/wife

IAWORK

Did you [or your [^husband / wife / partner]] do any work for pay in the last year (that is since [^date a year ago])?

1. Yes

5. No

IF [IAWORK = 1] ASK IASINC**IASINC**

About how much wage and salary income did you [and your [^husband / wife / partner]] receive in the last year before taxes and other deductions?

£0 ... £900,000

98. DK

99. RF

IF [IASINC = 98/99] ASK IASINCB
IASINCB

Was it less than [^amount], more than [^amount] or what?
 BRACKETS (10000, 20000, 35000, 100000)

IASPEN

Did you [or your [^husband / wife / partner]] receive any money from a state pension in the last year (that is since [^date a year ago])?
 Include basic state pension and SERPS.

- 1. Yes
- 5. No

IF (IASPEN = 1 AND IAASK = 1) ASK IASPW
IASPW

Which of you received the state pension in the last year?

- 1. Respondent only
- 2. Spouse / partner only
- 3. Both

IF ((IASPEN = 1) AND (IAASK = 2)) OR (IASPW = 1 or 3)
IASPA

How much do you receive from the state pension?

- 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)
- 98. DK
- 99. RF

IF [IASPA = 01 TO 95] ASK IAPAM

IAPAM Enter amount.

If the amount is not known because it is paid with benefits, enter the total amount received here.

£0 ... £20,000

- 98. DK
- 99. RF

IF (IAPAM > £0) ASK IAPAM2

IAPAM2

INTERVIEWER: Was <amount given at IAPAM> an exact amount or was it a total amount received with other benefits? IF NECESSARY PLEASE CLARIFY WITH THE RESPONDENT

1. Exact amount
2. Total amount received with other benefits

IF ((IAPAM = 98 or 99) AND IASPA = 1) ASK IASPWB

IASPWB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

ELSE IF ((IAPAM = 98 or 99) AND IASPA = 2) ASK IASPFB

IASPFB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

ELSE IF ((IAPAM = 98 or 99) AND IASPA = 4 or 5) ASK IASPMB

IASPMB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

ELSE IF ((IAPAM = 98 or 99) AND IASPA = 52 or 95) ASK IASPYB

IASPYB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 4000, 5000, 7500)

ELSE IF ((IAPAM = 98 or 99) AND IASPA = 3, 7,8,9,10,13,26,90 or 96) ASK IASPOB**ELSE IF (IASPA = 96, 98 or 99) ASK IASPOB**

IASPOB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

IAPLY

Did you start receiving this state pension in the last year (that is since [^date a year ago])?

1. Yes
5. No

IF [IAPLY = 1] ASK IAPLYW
IAPLYW

Which month did you start receiving it?

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

IF [IASPW = [2, 3]] ASK IASPP
IASPP

How much [^does / did] your [^husband / wife / partner] receive from the state pension?

- 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)
- 98. DK
- 99. RF

IF [IASPP = 01 to 95] ASK IAPPAM
IAPPAM

Enter amount.

If the amount is not known because it is paid with benefits, enter the total amount received here.

£0 ... £20,000

- 98. DK
- 99. RF

IF (IAPPAM > £0) ASK IAPPAM2

IAPPAM2

INTERVIEWER: Was <amount given at IAPPAM> an exact amount or was it a total amount received with other benefits? IF NECESSARY PLEASE CLARIFY WITH THE RESPONDENT

1. Exact amount
2. Total amount received with other benefits

IF ((IAPPAM = 98 or 99) AND IASPP = 1) ASK IASPPWB

IASPPWB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

ELSE IF ((IAPPAM = 98 or 99) AND IASPP = 2) ASK IASPPFB

IASPPFB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

ELSE IF ((IAPPAM = 98 or 99) AND IASPP = 4 or 5) ASK IASPPMB

IASPPMB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

ELSE IF ((IAPPAM = 98 or 99) AND IASPP = 52 or 95) ASK IASPPYB

IASPPYB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 4000, 5000, 7500)

ELSE IF ((IAPPAM = 98 or 99) AND IASPP = 3, 7,8,9,10,13,26,90 or 96) ASK IASPOB**ELSE IF (IASPP = 96, 98 or 99) ASK IASPOB**

IASPOB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

IAPLYP

Did your [^husband / wife / partner] start receiving this pension in the last year (that is since [^date a year ago])?

1. Yes
5. No

IF [IAPLYP = 1] ASK IAPLW**IAPLW**

Which month did your [^husband / wife / partner] start receiving it?

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

IAPPEN

Did you [or your ^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
- 5. No

IF [IAPPEN = 1] ASK IAPPMO**IAPPMO**

About how much income did you [and your ^husband / wife / partner] receive in the last month from personal or employer pensions before taxes and other deductions?

Do not include any lump sums received.

£0 ... £20,000

98. DK

99. RF

IF (IAPPMO = 98 or 99) ASK IAPPMOB**IAPPMOB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 8000, 30000)

IF [IAPPEN = 2] ASK IAPPEI**IAPPEI**

About how much income did you [and your ^husband / wife / partner] receive in the last year from personal or employer pensions before taxes and other deductions?

Do not include any lump sums received.

£0 ... £20,000

98. DK

99. RF

**IF (IAPPEI = 98 or 99) ASK IAPPEIB
IAPPEIB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 8000, 30000)

IAANIN

Apart from any pension annuity income and anything else you have already told me about, did you [or your [^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
5. No

**IF ((IAANIN = 1) AND [IAASK = 1])) AND (IAINTRO = 1) ASK IAAILY
IAAILY**

Which of you received annuity income in the last year?

1. Respondent only
2. Spouse / partner only
3. Both

**IF [(IAAILY = [1, 3]) OR ((IAANIN = 1) AND [IAASK = 2]))] ASK IAAIM
IAAIM**

How much annuity income did you receive in the last year after tax?

£0 ... £20,000

98. DK
99. RF

**IF [(IAAIM = 98 or 99)] ASK IAAIMB
IAAIMB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (400, 1000, 2000, 15000)

IF (IAAILY = [2, 3]) ASK IAAIP**IAAIP**

How much annuity income did your [^husband / wife / partner] receive in the last year after tax?

£0 ... £20,000

98. DK

99. RF

IF (IAAIP = 98 or 99) ASK IAAIPB**IAAIPB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (400, 1000, 2000, 15000)

IAHDBC

[^Are you [/ Is your [husband / wife / partner]]] receiving any of these health or disability benefits at the moment? **SHOW CARD IA1**

1 Yes

2 No

IF (IAHDBC = 1) ASK IAHDN**IAHDN:**

Which of these health or disability benefits are you personally receiving at the moment?

PROBE: What others? **SHOW CARD IA1**

INTERVIEWER NOTE: 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. Disability Living Allowance
- 07. Industrial Injuries Disablement Benefit
- 08. War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme
- 09. Carer's Allowance
- 95. Some other benefit for people with disabilities (SPECIFY)
- 96. None of these
- 98. DK
- 99. RF

IF (IAHDN = 95] ASK IAHDNO**IAHDNO**

Enter the name of the other benefit

IANEW1: Which of these health or disability benefits did you unsuccessfully apply for in the last 12 months? **SHOW CARD IA1**

INTERVIEWER NOTE: 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. Disability Living Allowance
- 07. Industrial Injuries Disablement Benefit
- 08. War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme
- 09. Carer's Allowance
- 95. Some other benefit for people with disabilities (SPECIFY)
- 96. None of these
- 98. DK
- 99. RF

IANEW2: Which of these health or disability benefits did you stop receiving following an unfavourable review in the last 12 months? **SHOW CARD IA1.**

INTERVIEWER NOTE: 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. Disability Living Allowance
- 07. Industrial Injuries Disablement Benefit
- 08. War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme
- 09. Carer's Allowance
- 95. Some other benefit for people with disabilities (SPECIFY)
- 96. None of these
- 98. DK
- 99. RF

IF (IAHDN = 01 to 95) ASK IAP**IAP**

How much did you / your [^husband / wife / partner]
[usually] receive from ...

[^Incapacity benefit previously named invalidity benefit /

Employment and Support Allowance /

Severe Disablement Allowance SDA /

Statutory sickpay 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.] [last time]?

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)

98. DK

99. RF

IF [IAP = 01 to 95] ASK IAA**IAA**

Enter the amount.

[If Don't Know amount because received with other benefits, enter total amount
received here. Enter -97 if amount already counted elsewhere.]

£0 ... £20,000

-97. Amount already counted elsewhere

-98. DK

-99. RF

IF (IAA > £0) ASK IAAX2

IAAX2

INTERVIEWER: Was <amount given at IAA> an exact amount or was it a total amount received with other benefits? IF NECESSARY PLEASE CLARIFY WITH THE RESPONDENT

1. Exact amount
2. Total amount received with other benefits

IF ((IAA = -98 or -99) AND IAP = 1) ASK IAWB

IAWB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (50, 75, 100, 150)

ELSE IF ((IAA = -98 or -99) AND IAP = 2) ASK IAFB

IAFB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (100, 150, 200, 300)

ELSE IF ((IAA = -98 or -99) AND IAP = 4 or 5) ASK IAMB

IAMB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (200, 300, 400, 600)

ELSE IF ((IAA = -98 or -99) AND IAP = 52 or 95) ASK IAYB

IAYB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (2500, 3750, 5000, 7500)

ELSE IF ((IAA = -98 or -99) AND IAP = 3, 7,8,9,10,13,26,90 or 96) ASK IAOB**ELSE IF (IAP = 96, 98 or 99) ASK IAOB**

IAOB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (200, 300, 400, 600)

IF (IAASK = 1 AND IAINTR0 = 1) ASK IAHDPN

IAHDPN

Which of these health or disability benefits is your [^husband / wife / partner] receiving at the moment? **SHOW CARD IA1**

PROBE: What others?

- 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. Disability Living Allowance
- 07. Industrial Injuries Disablement Benefit
- 08. War Disablement Pension or War Widow's Pension or Armed Forces Compensation Scheme
- 09. Carer's Allowance
- 95. Some other benefit for people with disabilities (SPECIFY)
- 96. None of these
- 98. DK
- 99. RF

IABEBC

[^Are you / Is [^your husband / wife / partner]] receiving any of these benefits at the moment? **SHOW CARD IA2**. Do not include housing benefit, or winter fuel allowance as "other". These are covered by later questions.

NOTE: Only include benefits that the respondent / spouse/partner is currently receiving

- 1. Yes
- 2. No

IF (IABEBC = 1) ASK IABEN**IABEN**

Which of these benefits [^are you / Is [^your husband / wife / partner]] receiving at the moment? **SHOW CARD IA2**

PROBE: What others?

[NOTE: 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. Income Support
- 02. Pension Credit (income support for the over 60's, replaced Minimum Income Guarantee in October 2003)
- 03. Working Tax Credit (formerly part of Working Families Tax Credit)
- 04. Job-seeker's Allowance formerly Unemployment Benefit
- 05. Guardian's Allowance
- 06. Widow's pension / Widowed mother's allowance / Widowed Parent's allowance / Bereavement allowance
- 07. Child Benefit
- 08. Child Tax Credit
- 95. Some other State Benefit (SPECIFY)
- 96. None of these
- 98. DK
- 99. RF

IF (IABEN = 01 to 95) ASK IAP2**IAP2**

How much did you / your [^husband / wife / partner]

[usually] receive from

[^Income Support /

Pension Credit /

Working Tax Credit /

Job-seeker's Allowance /

Guardian's Allowance /

Widow's pension or Widowed mother's allowance or Widowed Parent's allowance or

Bereavement allowance /

Child Benefit /

Child Tax Credit] [last time]?

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)

98. DK

99. RF

IF [IAP2 = 01 to 95] ASK IAA2**IAA2**

Enter the amount.

[If Don't Know amount because received with other benefits, enter total amount received here. Enter -97 if amount already counted elsewhere.]

£0 ... £20,000

-97. Amount already counted elsewhere

-98. DK

-99. RF

IF (IAA2 > £0) ASK IAA2X2**IAA2X2**

INTERVIEWER: Was <amount given at IAA2> an exact amount or was it a total amount received with other benefits? IF NECESSARY PLEASE CLARIFY WITH THE RESPONDENT

1. Exact amount

2. Total amount received with other benefits

IF ((IAA2 = -98 or -99) AND IAP2 = 1) ASK IAWB2**IAWB2**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 75, 100, 150)

ELSE IF ((IAA2 = -98 or -99) AND IAP2 = 2) ASK IAFB2**IAFB2**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 200, 300)

ELSE IF ((IAA2 = -98 or -99) AND IAP2 = 4 or 5) ASK IAMB2**IAMB2**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

ELSE IF ((IAA2 = -98 or -99) AND IAP2 = 52 or 95) ASK IAYB2**IAYB2**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 3750, 5000, 7500)

ELSE IF ((IAA2 = -98 or -99) AND IAP2 = 3, 7,8,9,10,13,26,90 or 96) ASK IAOB2**ELSE IF (IAP2 = 96, 98 or 99) ASK IAOB2****IAOB2**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (200, 300, 400, 600)

IF (person's age >= 60) OR ((whether partner in household too = yes) AND (DMAge >= 60))

IF [(IAgeOf >= 60) OR ((IAASK = 1) AND (DMAge = >60))] ASK IAFUEL**IAFUEL**

Did you [or your [^husband / wife / partner]] receive a Winter Fuel Payment in the last year (that is since [^date a year ago])?

1. Yes

5. No

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 [or [^your [^husband / wife / partner]] may have. [Please include only savings and investments held in your sole name.]

IASI

Which, if any, of these do you [or [^your [^husband / wife / partner]] have? **SHOW CARD**

IA3

PROBE: What others?

- 01. Current Account at a bank, building society or elsewhere
- 02. Savings Account at a bank, building society, credit union or elsewhere
- 03. ISA
- 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
- 98. DK
- 99. RF

IF (IASI = 01, 02) ASK IASAVA**IASAVA**

In total, how much do you [and your [^husband / wife / partner]] have in your [^current account(s) / savings account(s) / current and savings account(s)] (at the bank, building society or elsewhere)?

[NOTE: If current account is overdrawn, enter amount in savings account only. / Enter '0' if overdrawn.]

£0 ... £10,000,000

-98. DK

-99. RF

IF (IASAVA = -98 or -99) ASK IASAVAB**IASAVAB**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 5000, 20000, 150000)

IASINT

About how much interest did you [and your [^husband / wife / partner]] receive from (this / these) account(s) in the last year after tax?

£0 ... £10,000

-98. DK

-99. RF

IF (IASINT = -98 or -99) ASK IASINTB**IASINTB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (25, 100, 500, 7500)

IF (IASI = 3) ASK IAISA**IAISA**

Which of the following do you [and your [^husband / wife / partner]] have in ISA(s)...

1 ... cash?

3 ... stocks and shares?

98. DK

99. RF

IF [IAISA = 1] ASK IACISA**IACISA**

How much do you [and your [^husband / wife / partner]] currently have in the cash components of ISA(s)?

£0 ... £100,000

-98. DK

-99. RF

IF (IACISA = -98 or -99) ASK IACISAB**IACISAB**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 15000, 20000)

IF (IAISA = 3) ASK IASISA**IASISA***

How much is the stocks and shares component of your [and your [^husband's / wife's / partner's]] ISA(s) currently worth?

£0 ... £100,000

-98. DK

-99. RF

IF (IASISA = -98 or -99) ASK IASISAB**IASISAB**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 25000, 50000)

IAISAD

Not including any income that was re-invested, about how much income did you [and your [^husband / wife / partner]] receive from (this / these) ISA(s) in the last year?

£0 ... £100,000

-98. DK

-99. RF

IF (IAISAD = -98 or -99) ASK IAISADB**IAISADB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 150, 300, 2000)

IF (IASI = 4) ASK IANPB

IANPB

How much do you [and your [^husband / wife / partner]] have in Premium Bonds?

£0 ... £100,000

-98. DK

-99. RF

IF (IANPB = -98 or -99) ASK IANPBB
IANPBB

Is it less than [^amount], more than [^amount] or what?
BRACKETS (100, 200, 500, 5000)

IANPBP

How much prize income did you [and your [^husband / wife / partner]] receive from these bonds in the last year?

£0 ... £100,000

-98. DK

-99. RF

IF (IANPBP = -98 or -99) ASK IAPBPB
IAPBPB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (50, 100, 1000, 10000)

IF (IASI = 5) ASK IANS
IANS

How much do you [and your [^husband / wife / partner]] have in National Savings Accounts or Certificates?

£0 ... £100,000

-98. DK

-99. RF

IF (IANS = -98 or -99) ASK IANSB
IANSB

Is it less than [^amount], more than [^amount] or what?
BRACKETS (500, 2500, 10000, 100000)

IANSI

About how much interest did you [and your [^husband / wife / partner]] receive from these accounts or certificates in the last year after tax?

£0 ... £100,000

-98. DK

-99. RF

IF (IANSI = -98 or -99) ASK IANSIB
IANSIB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (10, 50, 150, 5000)

IF (IASI = 6, 7, 8) ASK IASSS**IASSS**

If you chose to sell your [^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 you [and your [^husband / wife / partner]] have?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IaSSS = -98 or -99) ASK IASSSB**IASSSB**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2500, 10000, 100000)

IASSSI*

About how much dividend income did you [and your [^husband / wife / partner]] receive from [^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?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IASSSI = -98 or -99) ASK IASSSIB**IASSSIB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 150, 600, 15000)

IASHTYP

Which of the following types of shares do you [and your [^husband / wife / partner]] have

1 ...shares in privatised industries (for example, British Telecom, Northern Ireland Electricity or Post Office?

2 ...shares in demutualised building societies or other mutual societies?

3 ...shares in other UK listed companies?

4 ...shares in foreign listed companies?

IF (IASI = 9) ASK IAUIT**IAUIT**

If you chose to sell your Unit trusts or Investment trusts today, about how much would you [and your [^husband / wife / partner]] have?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IAUIT = -98 or -99) ASK IAUITB**IAUITB**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (5000, 10000, 50000, 200000)

IAUITI

Not including any income that was re-invested, about how much income did you / [and your [^husband / wife / partner]] receive from these Unit trusts or Investment trusts in the last year after tax?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IAUITI = -98 or -99) ASK IAUITIB
IAUITIB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (150, 500, 1250, 10000)

IF (IASI = 10) ASK IABG
IABG

If you chose to sell your bonds and gilts today, about how much would you [and your [^husband / wife / partner]] have?
£0 ... £10,000,000
-98. DK
-99. RF

IF (IABG = -98 or -99) ASK IABGB
IABGB

Would it be less than [^amount], more than [^amount] or what?
BRACKETS (10000, 20000, 40000, 100000)

IABGI

About how much income did you [and your [^husband / wife / partner]] receive from these Bonds and Gilts in the last year after tax?
£0 ... £10,000,000
-98. DK
-99. RF

IF (IABGI = -98 or -99) ASK IABGIB
IABGIB

Was it less than [^amount], more than [^amount] or what?
BRACKETS (100, 300, 1000, 50000)

IF (IASI = 95) ASK IASIO
IASIO*

How much in total do you [and your [^husband / wife / partner]] have in other savings or investments?
£0 ... £10,000,000
-98. DK
-99. RF

IF (IASIO = -98 or -99) ASK IASIOB
IASIOB

Is it less than [^amount], more than [^amount] or what?
BRACKETS (1000, 5000, 20000, 100000)

IASIOI

About how much interest did you [and your [^husband / wife / partner]] receive from these other savings or investments in the last year after tax?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IASIOI = -98 or -99) ASK IASIOIB**IASIOIB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 150, 500, 10000)

IALI

Do you [or your [^husband / wife / partner]] have any life insurance policies?

1. Yes

5. No

IF (IALI = 1 AND IAASK = 1) ASK IALIW**IALIW***

Which of you has life insurance policies?

1. Respondent only

2. Spouse / partner only

3. Both

IF (IALI = 1 AND IALIW = 1 or 3) ASK IALIYA**IALIYA***

How much would your dependants get from your life insurance policy or policies if you died?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IALIYA = -98 or -99) ASK IALIYAB**IALIYAB**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (20000, 50000, 100000, 400000)

IF (IALIW = 2 or 3) ASK IALIPA**IALIPA**

How much would your [^husband's / wife's / partner's] dependants get from (his / her) life insurance policy or policies if (he / she) died?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IALIPA = -98 or -99) ASK IALIPAB

IALIPAB

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (20000, 50000, 100000, 400000)

IASC

Do any of [your / your and your [^husband's / wife's / partner's] / your [^husband's / wife's / partner's]] life insurance policy or policies have a savings component?

That is the value of the fund will be paid at some point in the future.

1. Yes

5. No

IF (IASC = 1) ASK IASCA

IASCA

About how much in total will (this / these) savings component(s) yield when (it / they) mature(s)?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IASCA = -98 or -99) ASK IASCAB

IASCAB

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 25000, 50000, 250000)

IF (IASI = 01 to 95) ASK IADOC

IADOC

INTERVIEWER: PLEASE ANSWER. Did the respondent...

1. consult documents frequently
2. consult documents occasionally
3. not consult documents

IAINTA

INTERVIEWER: PLEASE ANSWER.

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

ASK IAPROP TO IAOSAB IF (CS017 = 1 or 3) "FINANCIAL RESPONDENT"**IAPROP**

Which, if any, of these assets do you [or your [^husband / wife / partner]] have, not including your own home? **SHOW CARD IA4**

PROBE: What others?.

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
98. DK
99. RF

IF (IAPROP = 1) ASK IAHOME**IAHOME**

IF you chose to sell your other house or holiday home and then paid off any debts on it, about how much would you [and your [^husband / wife / partner]] get?

£0 ... £100,000,000

- 98. DK
- 99. RF

IF (IAHOME = -98 or -99) ASK IAHOMEB**IAHOMEB**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (10000, 50000, 100000, 250000)

IAIR

Did you [and your [^husband / wife / partner]] receive any income or rent from that property in the last year?

1. Yes
5. No

IF (IAIR = 1) ASK IAIRA**IAIRA***

How much income or rent did you [and your [^husband / wife / partner]] receive from that property in the last year, after any expenses and taxes?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IAIRA = -98 or -99) ASK IAIRB**IAIRB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 7500, 50000)

IF (IAPROP = 2) ASK IAFBPS**IAFBPS**

If you sold your Farm or Business property and then paid off any debts on it, about how much would you [and your [^husband / wife / partner]] get?

£0 ... £100,000,000

-98. DK

-99. RF

IF (IAFBPS = -98 or -99) ASK IAFBPSB**IAFBPSB**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (10000, 50000, 100000, 500000)

IAFBPR

Did you [and your [^husband / wife / partner]] receive any income or rent from that property in the last year?

1. Yes

5. No

IF (IAFBPR = 1) ASK IAFBA**IAFBA**

How much income or rent did you [and your [^husband / wife / partner]] receive from that property in the last year, after any expenses and taxes?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IAFBA = 98 or 99) ASK IAFBAB**IAFBAB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1500, 4000, 7500, 50000)

**IF (IAPROP = 3, 4, 5, 6, 95) ASK IAOASA
IAOASA**

How much is [^the other land / the money owed to you by others / the trust / the covenant or inheritance / the other land and the money owed to you by others / the other land and the trust / the other land and the covenant or inheritance etc.] worth?

£0 ... £100,000,000

-98. DK

-99. RF

**IF (IAOASA = -98 or -99) ASK IAOASAB
IAOASAB**

Would it be less than [^amount], more than [^amount] or what?

BRACKETS (5000, 7500, 20000, 100000)

ASK ALL**IAREGP**

Apart from anything you have already told me about, did you receive any regular payments from people not living here in the past year (that is since [^date a year ago])?

- 1. Yes
- 5. No

IF (IAREGP = 1) CONTINUE – OTHERS GO TO IAPAR

LOOP UP TO 4 TIMES (QUESTIONS MARKED WITH (X))

IF (first iteration of the loop OR AOTHP(x) = 1) ASK IAPAY(x)**IAPAY(x)**

Thinking about your [^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
- 98. DK
- 99. RF

IAPAYR(x)

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)
- 98. DK
- 99. RF

IF (IAPAYR(x) = 95) ASK IAPAYO(x)**IAPAYO(x)**

Enter other reason.

IAREGO(x)

What period did your 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)
- 98. DK
- 99. RF

IF (IAREGO(x) = 01 to 95) ASK IAREGM(x)**IAREGM(x)**

And about how much did you [usually] receive?

- £0 ... £100,000
- 98. DK
- 99. RF

IF ((IAREGM(x) = -98 or -99) AND IAREGO(x) = 1) ASK IAREGMWB**IAREGMWB(x)**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (25, 50, 100, 2000)

ELSE IF ((IAREGM(x) = -98 or -99) AND IAREGO(x) = 2) ASK IAREGMFB**IAREGMFB(x)**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 100, 200, 4000)

ELSE IF ((IAREGM(x) = -98 or -99) AND IAREGO(x) = 4 or 5) ASK IAREGMMB**IAREGMMB(x)**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 400, 8000)

ELSE IF ((IAREGM(x) = -98 or -99) AND IAREGO(x) = 52 or 95) ASK IAREGMYB**IAREGMYB(x)**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1250, 2500, 5000, 100000)

ELSE IF ((IAREGM(x) = -98 or -99) AND IAREGO(x) = 3, 7,8,9,10,13,26,90 or 96) ASK IAREGMOB(x)

ELSE IF (IAREGO(x) = 96, 98 or 99) ASK IAREGMOB(x)
IAREGMOB(x)

Was it less than [^amount], more than [^amount] or what?
BRACKETS (100, 200, 400, 8000)

IAREGYR(x)

Did you receive this for the whole year, that is since [^date a year ago]?

- 1. Yes
- 5. No

IF (IAREGYR(x) = 5) ASK IAREGMW(x)

IAREGMW(x)

How many months / weeks did you receive this payment for?
Code whether the answer is given in months or weeks.

- 1. months
- 2. weeks

IAREGMWA(x)

Enter number of months or weeks.

Range: 0..97
-98 Don't know
-99 Refused

AOTHP(x)

Did you receive any other regular payments from people not living here in the past year?

- 1. Yes (REPEAT THE LOOP UP TO 4 TIMES)
- 5. No

IF [(IAASK = 1) AND (IAINTRO = 1)] ASK IAPAR**IAPAR**

Apart from anything you have already told me about, did you (or) / your [^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
5. No

IF (IAPAR = 1) CONTINUE – OTHERS GO TO IAPK

LOOP UP TO 4 TIMES (QUESTIONS MARKED WITH (Y))

IF (first iteration of the loop OR IAMRP(y) = 1) ASK IAPS(x)**IAPS(y)**

Thinking about your (or) / your [^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
98. DK
99. RF

IAPR(y)

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)
98. DK
99. RF

IF (IAPR(y) = 95) ASK IAPARO(y)
IAPARO(y)

Enter other reason.

IAPF(y)

What period did your 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)
- 98. DK
- 99. RF

IF (IAPF(y) = 01 to 95) ASK IAPAM(y)

IAPAM(y)

And about how much did your (or) / your [^husband / wife / partner]'s] usually receive?

£0 ... £100,000

-98. DK

-99. RF

IF ((IAPAM(y) = -98 or -99) AND IAPF(y) = 1) ASK IAPWB(y)

IAPWB(y)

Was it less than [^amount], more than [^amount] or what?

BRACKETS (25, 50, 100, 2000)

ELSE IF ((IAPAM(y) = -98 or -99) AND IAPF(y) = 2) ASK IAPFB(y)

IAPFB(y)

Was it less than [^amount], more than [^amount] or what?

BRACKETS (50, 100, 200, 4000)

ELSE IF ((IAPAM(y) = -98 or -99) AND IAPF(y) = 4 or 5) ASK IAPMB(y)

IAPMB(y)

Was it less than [^amount], more than [^amount] or what?

BRACKETS (100, 200, 400, 8000)

ELSE IF ((IAPAM(y) = -98 or -99) AND IAPF(y) = 52 or 95) ASK IAPYB(y)

IAPYB(y)

Was it less than [^amount], more than [^amount] or what?
BRACKETS (1250, 2500, 5000, 100000)

**ELSE IF ((IAPAM(y) = -98 or -99) AND IAPF(y) = 3, 7,8,9,10,13,26,90 or 96) ASK
IAPOB(y)**

**ELSE IF (IAPF(y) = 96, 98 or 99) ASK IAPOB(y)
IAPOB(y)**

Was it less than [^amount], more than [^amount] or what?
BRACKETS (100, 200, 400, 8000)

IAREGYRP(y)

Did you (or) / you [^husband / wife / partner]] receive this for the whole year, that is since
[^date a year ago]?

1. Yes
5. No

IF (IAREGYRP = 5) ASK IAREGMWP(y)

IAREGMWP(y)

How many months / weeks did your (or) / your [^husband / wife's /partner]'s] receive this
payment for?

1. months
2. weeks

IAREGMWAP(y)

Enter number of months or weeks.

IAMRP(y)

Did you (or) / you [^husband / wife / partner]] receive any other regular payments from
people not living here in the past year?

1. Yes REPEAT LOOP UP TO 4 TIMES
5. No

IAPK

Which, if any, of these payments and payments in kind [^did / have / has] your [^husband / wife / partner] / [^partner's name] / [^you or [^partner's name] / you [or your [^husband / wife / partner]]] [^receive / received] in the last year (that is since [^date a year ago])? **SHOW CARD IA5**

PROBE: What others?

01. Life insurance policy
02. Lump sum pension payout
03. Personal Accident plan
04. Other insurance payment
05. Redundancy payment
06. Inheritance or bequest (inc. inherited property)
07. Win(s) on the football pools, national lottery or other form of gambling
95. Other payment (SPECIFY)
96. None of these
98. DK
99. RF

IF (IAPK = 95) ASK IAPKO**IAPKO**

Write in source of other payment.

IF (IAPK = 01 to 95) CONTINUE. OTHERS GO TO IADEBT

(Questions below are repeated for every payment reported in IAPK)

IAPKM(z)

How much in total did you [and your [^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 / other payment] in the last year (that is since [^date a year ago])?

£0 ... £10,000,000

-98. DK

-99. RF

IF (IAPKM(z) = 98 or 99) ASK IAPKMB(z)**IAPKMB(z)**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (2500, 5000, 15000, 50000)

LOOP FOR EACH PAYMENT AT IAPK

IADEBT

I would like to ask you about any other financial commitments you [or your [^husband / wife / partner]] may have apart from mortgages or housing related loans. Do you [or your [^husband / wife / partner]] currently owe any money on credit or store cards?

NOTE: Record 'No' if respondent pays off the balance on their credit or store cards each month.

1. Yes

5. No

IF (IADEBT = 1) ASK IADEBM**IADEBM**

How much was the outstanding balance on these cards after the last monthly payment was made?

£0 ... £100,000

-98. DK

-99. RF

IF (IADEBM = -98 or -99) ASK IADEBMB**IADEBMB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)

IAOWE

Do you [or your [^husband / wife / partner]] currently owe any money to friends, relatives, or other private individuals?

1. Yes

5. No

98. DK

99. RF

IF (IAOWE = 1) ASK IAOWEM**IAOWEM**

How much do you [and your [^husband / wife / partner]] owe?

£0 ... £1,000,000

-98. DK

-99. RF

IF (IAOWEM = -98 or -99) ASK IAOWETB**IAOWETB**

Was it less than [^amount], more than [^amount] or what?

BRACKETS (1000, 2000, 5000, 25000)

IAREGR

Do you [and your [^husband / wife / partner]] make regular repayments on these loans?

1. Yes

5. No

IF [IAREGR = 1] ASK IAREGRP**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)

98. DK

99. RF

IF (IAREGRP = 01 to 95) ASK IAREP**IAREP**

How much are your usual repayments?

£0 ... £100,000

-98. DK

-99. RF

IF ((IAREP = -98 or -99) AND IAREGRP = 1) ASK IARPWB**IARPWB**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10, 20, 50, 150)

ELSE IF ((IAREP = -98 or -99) AND IAREGRP = 2) ASK IARPFb**IARPFb**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (20, 40, 100, 300)

**ELSE IF ((IAREP = -98 or -99) AND IAREGRP = 4 or 5) ASK IARPMB
IARPMB**

Is it less than [^amount], more than [^amount] or what?
BRACKETS (40, 80, 200, 600)

**ELSE IF ((IAREP = -98 or -99) AND IAREGRP = 52 or 95) ASK IARPYB
IARPYB**

Is it less than [^amount], more than [^amount] or what?
BRACKETS (500, 1000, 2500, 7500)

**ELSE IF ((IAREP = -98 or -99) AND IAREGRP = 3, 7,8,9,10,13,26,90 or 96) ASK
IARPOB**

**ELSE IF (IAREGRP = 96, 98 or 99) ASK IARPOB
IARPOB**

Is it less than [^amount], more than [^amount] or what?
BRACKETS (40, 80, 200, 600)

IALOAN

On which, if any, of these do you [or your [^husband / wife / partner]] currently owe money? **SHOW CARD IA6**

PROBE: What others?

- 01. Hire purchase agreements
- 02. Personal loans (from bank, building society or other financial institution)
- 03. Overdraft
- 04. Catalogue or mail order purchase agreements
- 05. DWP social fund loan
- 06. Loan from a money lender or 'tally man'
- 96. None of these
- 98. DK
- 99. RF

IF (IALOAN = 01 to 06) ASK IALOAM

IALOAM*

How much in total do you [and your [^husband / wife / partner]] owe on these loans?
£0 ... £1,000,000
-98. DK
-99. RF

IF (IALOAM = -98 or -99) ASK IALOAMB

IALOAMB

Is it less than [^amount], more than [^amount] or what?
BRACKETS (1000, 2000, 5000, 25000)

IF (IALOAN = 01,02,04,05,06) ASK IALREP**IALREP**

What period do your [and your [^husband's / wife's / partner's]] usual repayments on these loans 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)
- 97. Doesn't make repayments
- 98. DK
- 99. RF

IF (IALREP = 01 to 95) ASK IALRE**IALRE**

How much are your usual repayments on these loans?

£0 ... £100,000

- 98. DK
- 99. RF

IF ((IALRE = -98 or -99) AND IALREP = 1) ASK IALRPWB**IALRPWB**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (10, 20, 50, 150)

ELSE IF ((IALRE = -98 or -99) AND IALREP = 2) ASK IALRPFB**IALRPFB**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (20, 40, 100, 300)

ELSE IF ((IALRE = -98 or -99) AND IALREP = 4 or 5) ASK IALRPMB**IALRPMB**

Is it less than [^amount], more than [^amount] or what?

BRACKETS (40, 80, 200, 600)

**ELSE IF ((IALRE = -98 or -99) AND IALREP = 52 or 95) ASK IALRPYB
IALRPYB**

Is it less than [^amount], more than [^amount] or what?
BRACKETS (500, 1000, 2500, 7500)

**ELSE IF ((IALRE = -98 or -99) AND IAREGRP = 3, 7,8,9,10,13,26,90 or 96) ASK
IALRPOB****ELSE IF (IALREP = 96, 98 or 99) ASK IALRPOB
IALRPOB**

Is it less than [^amount], more than [^amount] or what?
BRACKETS (40, 80, 200, 600)

ASK IAJNT TO IAX IF (CS017 = 1 or 3) "FINANCIAL RESPONDENT"**IF (IAASK = 1) ASK IAJNT
IAJNT**

Can I just check, do you have any savings, investments, property or other assets that
are held jointly with your [^husband / wife / partner]?

- 1. Yes
- 5. No

**IF [IAJNT = 1] ASK IAAM
IAAM**

About how much would your personal share amount to, minus share of any joint debts
you [and your [^husband / wife / partner]] might have?

£0 ... £1,000,000

- 98. DK
- 99. RF

**IF (IAAM = 98 or 99) ASK IAAMB
IAAMB**

Would it amount to less than [^amount], more than [^amount] or what?
BRACKETS (1000, 2500, 10000, 50000)

IAFCON

Which of the phrases on the card best describes how you [and your [^husband / wife / partner]] are getting along financially these days? **SHOW CARD IA7**

- 01. manage very well
- 02. manage quite well
- 03. get by alright
- 04. don't manage very well
- 05. have some financial difficulties
- 06. have severe financial difficulties
- 98. DK
- 99. RF

IF (IAASK = 1) ASK IAORGF**IAORGF**

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.

SHOW CARD IA8

- 01. I look after all the household money except my partner's personal spending money
- 02. My partner looks after all the household money except my personal spending money
- 03. I am given a housekeeping allowance. My partner looks after the rest of the money
- 04. My partner is given a housekeeping allowance. I look after the rest of the money
- 05. We share and manage our household finances jointly
- 06. We keep our finances completely separate
- 95. Some other arrangement
- 98. DK
- 99. RF

IF (IAORGF = 95) ASK IAORGD**IAORGD**

Please record details.

IF (IAASK = 1) ASK IAFIND**IAFIND**

In your household who has the final say in big financial decisions?

DO NOT PROMPT. CODE ONE ONLY.

- 01. Respondent
- 02. Partner
- 03. Both have equal say
- 95. Other
- 98. DK
- 99. RF

IF (IAFIND = 95) ASK IAFINW
IAFINW

Write in other answer.

IF THERE ARE ADULTS AGED 16 OR OVER IN THE HOUSEHOLD (APART FROM THE RESPONDENT OR THE RESPONDENT'S PARTNER) ASK IAHHINC – OTHERS GO TO IAX

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].

1. Continue
2. SPONTANEOUS: Respondent absolutely refuses outright to answer these questions

IF (IAHHINC = 2) ASK IAHHINCR THEN GO TO IAX

IAHHINCR

Please explain why the respondent is refusing to answer these questions

LOOP THROUGH EACH MEMBER OF THE HOUSEHOLD WHO IS AGED 16 OR OVER (UP TO PERSON 16) AND WHO IS NOT THE RESPONDENT OR THE RESPONDENT'S PARTNER – QUESTIONS MARKED WITH (p)

IAPAYW(p)

During the last year did ^name(p) do any work for pay?

1. Yes
5. No
98. DK
99. RF

IF (IAPAYW(p) = 1) ASK IAEARN(p)

IAEARN(p)

About how much money did ^name(p) earn from all jobs in the last year, before any tax or other deductions?

£0 ... £1,000,000

- 98. DK
- 99. RF

IF (IAEARN(p) = -98 or -99) ASK IAEARNB(p)

IAEARNB(p)

Was it less than [^amount], more than [^amount] or what?

BRACKETS (10000, 20000, 35000, 100000)

LOOP TO NEXT HOUSEHOLD MEMBER AGED 16 OR OVER

FOR OTHER HOUSEHOLD MEMBERS AGED 16 OR OVER – (NOT THE RESPONDENT OR THE RESPONDENT'S PARTNER) ASK IABENR(p) to IAOMMB – OTHERS GO TO IAX

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
- 5. No
- 98. DK
- 99. RF

IF (IABENR = 1) ASK IAREC

IAREC

Not including any job income, about how much in total did [^name] [and ^name] receive in the last year from benefits, pensions, interest, gifts or anything else (before any taxes or deductions)?

£0 ... £40,000

- 98. DK
- 99. RF

IF (IAREC = 98 or 99) ASK IARECB

IARECB

Was it less than [^amount], more than [^amount] or what?

BRACKETS (250, 500, 1000, 5000)

IAOM

Does [^name] [and [^name]] have more than £1,000 total in bank accounts, other financial assets, vehicles, property, or other investments?

- 1. Yes
- 5. No
- 98. DK
- 99. RF

IF (IAOM = 1) ASK IAOMM

IAOMM

About how much altogether would that amount to, minus any debts he / she / they might have?

£1000 ... £1,000,000

- 98. DK
- 99. RF

IF (IAOMM = -98 or -99) ASK IAOMMB

IAOMMB

Would it amount to less than [^amount], more than [^amount] or what?

BRACKETS (1000, 5000, 20000, 150000)

IAX

The Income and Assets section is finished.

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

SECTION 17: EXPECTATIONS (EX)

Your financial situation

FS001: 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?

SHOW CARD FS1

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Most of the time

98. DK

99. RF

FS002: Compared to the financial situation of other people living around here, would you say your household is...)

SHOW CARD FS2

- 1 Much worse off
- 2 A bit worse off
- 3 About the same
- 4 A bit better off, or
- 5 Much better off

98. DK

99. RF

FS003: And how does your financial situation compare with most of your friends, (would you say your household is...)

SHOW CARD FS2

- 1 Much worse off
- 2 A bit worse off
- 3 About the same
- 4 A bit better off, or
- 5 Much better off
- 6 SPONTANEOUS: No friends

98. DK

99. RF

FS004: And how does your financial situation compare to most of your close work colleagues, (would you say your household is...)

SHOW CARD FS2

- 1 Much worse off
- 2 A bit worse off
- 3 About the same
- 4 A bit better off, or
- 5 Much better off
- 6 SPONTANEOUS ONLY: No work colleagues

98. DK

99. RF

FS005: Does having too little money stop you from doing any of the following things?

SHOW CARD FS3

- 01 Buy your first choices of food items
- 02 Have family and friends round for a drink or meal
- 03 Have an outfit to wear for social or family occasions
- 04 Keep your home in a reasonable state of decoration
- 05 Replace or repair broken electrical goods
- 06 Pay for fares or other transport costs to get to and from places you want to go
- 07 Buy presents for friends or family once a year
- 08 Take the sorts of holidays you want
- 09 Treat yourself from time to time
- 96 None of these
- 98. DK
- 99. RF

EX107:

HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION EX?

- 1. NEVER
- 2. A FEW TIMES
- 3. MOST OR ALL TIMES

SECTION 18: SOCIAL PARTICIPATION (SP)

Local area

SP01: I would like to ask you a couple of questions about where you live.
How satisfied are you with this area as a place to live? **SHOW CARD SP1**

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Slightly dissatisfied
5. Very dissatisfied

SP02: How satisfied are you with this accommodation? **SHOW CARD SP1**

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Slightly dissatisfied
5. Very dissatisfied

SECTION 19: SOCIAL CAPITAL (SC)

Views about the area

SC001: How long have you lived in this area?

1. Less than 12 months
2. 12 months but less than 2 years
3. 2 years but less than 3 years
4. 3 years but less than 5 years
5. 5 years but less than 10 years
6. 10 years but less than 20 years
7. 20 years or longer
8. All my life
9. Don't know

Views about the neighbourhood

Now I'd like to ask you a few questions about your immediate neighbourhood, by which I mean your street or block.

SC003: In general, what kind of neighbourhood would you say you live in - would you say it is a neighbourhood in which people do things together and try to help each other, or one in which people mostly go their own way?

1. Help each other
2. Go own way
3. Mixture
4. Don't know

SC004: To what extent do you agree or disagree that this neighbourhood is a place where people from different backgrounds get on well together? **SHOW CARD SC1**

1. Definitely agree
2. Tend to agree
3. Tend to disagree
4. Definitely disagree
5. DON'T KNOW
6. TOO FEW PEOPLE IN NEIGHBOURHOOD
7. ALL SAME BACKGROUNDS

SC005: Would you say that **SHOW CARD SC2**

1. Most of the people in your neighbourhood can be trusted
2. Some can be trusted
3. A few can be trusted
4. Or that no-one can be trusted?
5. Just moved here
6. Don't know

SC006: Suppose you lost your (purse/wallet) containing your address details, and it was found in the street by someone living in this neighbourhood. How likely is it that it would be returned to you with nothing missing? **SHOW CARD SC3**

1. Very likely
2. Quite likely
3. Not very likely
4. Or not at all likely
5. Don't know

*I am going to read out a list of problems which some people face in their neighbourhood. For each one, please can you tell me how much of a problem it is. **SHOW CARD SC4***

	Very big problem	Fairly big problem	Not a very big problem	Not a problem at all	It happens but it's not a problem	Don't know
SC007: How much of a problem are people being drunk or rowdy in public places?	1	2	3	4	5	98
SC008: How much of a problem is rubbish or litter lying around?	1	2	3	4	5	98
SC009: How much of a problem are vandalism, graffiti and other deliberate damage to property or vehicles?	1	2	3	4	5	98
SC010: How much of a problem are people using or dealing drugs?	1	2	3	4	5	98
SC011: How much of a problem is people being attacked or harassed because of their skin colour, ethnic origin or religion?	1	2	3	4	5	98
SC012: How much of a problem are teenagers hanging around on the street?	1	2	3	4	5	98
SC013: How much of a problem are troublesome neighbours?	1	2	3	4	5	98

Social networks

The next few questions are about how often you personally contact your relatives, friends and neighbours. Not counting the people you live with, how often do you do any of the following? **SHOW CARD SC9**

	1. On most days	2. Once or twice a week	3. Once or twice a month	4. Less often than once a month	5. Never	6. Don't know
SC025. Speak to relatives on the phone	1	2	3	4	5	6
SC026. Write a letter or note to relatives	1	2	3	4	5	6
SC027. Text or email relatives, or use chatrooms on the internet to talk to relatives	1	2	3	4	5	6
SC028. Speak to friends on the phone	1	2	3	4	5	6
SC029. Write a letter or note to friends	1	2	3	4	5	6
SC030. Text or email friends, or use chatrooms on the internet to talk to friends	1	2	3	4	5	6
SC031. Speak to neighbours	1	2	3	4	5	6
SC032. How often do you meet up with relatives who are not living with you?	1	2	3	4	5	6
SC033. How often do you meet up with friends?	1	2	3	4	5	6

Social support

I am going to describe two situations where people might need help. For each one, could you tell me if there is anyone you could ask for help?

(IF MORE THAN ONE PERSON IN HOUSEHOLD ADD: Please include people living with you and people outside the household)

SC034 You are ill in bed and need help at home. Is there anyone you could ask for help?

1. Yes
5. No

IF (SC034 = 1) ASK SC036a OTHERS GO TO SC035

SC036a Please can you look at this card and tell me who you could ask for help?

SHOW CARD SC10

1. Husband/wife/partner
2. Other household member
3. Relative (outside household)
4. Friend
5. Neighbour
6. Work colleague
7. Voluntary or other organisation
8. Other
9. Would prefer not to ask for help
10. Don't know

SC035 You are in financial difficulty and need to borrow some money to see you through the next few days. Is there anyone you could ask for help?

1. Yes
5. No

IF (SC035 = 1) ASK SC036b OTHERS GO TO SC037

SC036 Please can you look at this card and tell me who you could ask for help?

SHOW CARD SC10

1. Husband/wife/partner
2. Other household member
3. Relative (outside household)
4. Friend
5. Neighbour
6. Work colleague
7. Voluntary or other organisation
8. Other
9. Would prefer not to ask for help
10. Don't know

SC037 If you had a serious personal crisis, how many people, if any, do you feel you could turn to for comfort and support?

(INTERVIEWER: IF MORE THAN 15, CODE AS 15)

(0-15, Don't know)

Involvement in groups, clubs and organisations

The next questions are about involvement in groups, clubs and organisations. These could be formally organised groups or just groups of people who get together to do an activity or talk about things. Please exclude just paying a subscription, giving money and anything that was a requirement of your job.

I am going to ask about 3 different types of groups:

SC038 First, in the last 12 months, have you been involved with any groups of people who get together to do an activity or to talk about things? These could include evening classes, support groups, slimming clubs, keep-fit classes, pub teams and so on.

1. Yes

5. No

IF (SC038 = 1 “yes”) ASK SC039

SC039 Please can you look at this card. Which of the categories on this card best describe the groups you have taken part in? **SHOW CARD SC11**

1. Hobbies/social clubs

2. Sports/exercise groups, including taking part, coaching or going to watch

3. Local community or neighbourhood groups

4. Groups for children or young people

5. Adult education groups

6. Groups for older people

7. Environmental groups

8. Health, disability and welfare groups

9. Political groups

10. Trade union groups

11. Religious groups, including going to a place of worship or belonging to a religious based group

12. Other group

13. None of these

14. Don't know

SC040 Second, in the last 12 months, have you taken part in any (other) group activities as part of a local or community group, club or organisation? These could include residents' associations, Sports groups, parent-teacher associations, school or religious groups and so on.

1. Yes

5. No

IF (SC040 = 1 “yes”) ASK SC041

SC041 Please can you look at this card. Which of the categories on this card best describe the groups you have taken part in? **SHOW CARD SC11**

1. Hobbies/social clubs
2. Sports/exercise groups, including taking part, coaching or going to watch
3. Local community or neighbourhood groups
4. Groups for children or young people
5. Adult education groups
6. Groups for older people
7. Environmental groups
8. Health, disability and welfare groups
9. Political groups
10. Trade union groups
11. Religious groups, including going to a place of worship or belonging to a religious based group
12. Other group
13. None of these
14. Don't know

SC042 And third, in the last 12 months, have you taken part in any (other) group activities as part of a national group, club or organisation? These could include pressure groups, charities, political groups, environmental groups and so on.

1. Yes
5. No

IF (SC042 = 1 “yes”) ASK SC043

SC043 Please can you look at this card. Which of the categories on this card best describe the groups you have taken part in? **SHOW CARD SC11**

1. Hobbies/social clubs
2. Sports/exercise groups, including taking part, coaching or going to watch
3. Local community or neighbourhood groups
4. Groups for children or young people
5. Adult education groups
6. Groups for older people
7. Environmental groups
8. Health, disability and welfare groups
9. Political groups
10. Trade union groups
11. Religious groups, including going to a place of worship or belonging to a religious based group
12. Other group
13. None of these
14. Don't know

SC049 Now I'd like to talk about any unpaid help you may have received. In the past month have you received any unpaid help in any of the ways shown on the card. Please do not count help from people who live with you or from an organisation or group.

SHOW CARD SC12

1. Domestic work, home maintenance or gardening
2. Provision of transport or running errands
3. Help with child care or babysitting
4. Teaching, coaching or giving practical advice
5. Giving emotional support
6. Other
7. Don't know
8. None of these