

# **English Longitudinal Study of Ageing**

**Wave Three Interview Questionnaire – 2006-2007**

**Draft Version 1.0 - October 2006**

## **IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE**

Please be aware that this is a early draft of the questionnaire, so caution should be taken when using this document. Some parts of the questionnaire still need to be improved (e.g. making the routing clearer) and checked for any inaccuracies. You may find it helpful to refer to the Wave 2 or Wave 1 questionnaires as many of the variables and the routing is the same in each wave. We hope to circulate an improved version of the Wave 3 questionnaire with the phase 2 dataset.

### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

Unfortunately, in this version of the document some of the textfills do not appear. For variables that were in Waves 1 and/or 2, please look at the questionnaire documentation for these waves as it is very likely that the question will have stayed the same.

### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. However, these checks are not included in this version of the documentation.

### **Descriptors**

In this version of the questionnaire, some variables have a short descriptor of that variable written next to the variable name in un-bold caps.

### **Queries**

Please contact Kate Cox ([k.cox@natcen.ac.uk](mailto:k.cox@natcen.ac.uk)) if you have any queries about the questionnaire.

**HOUSEHOLD  
DEMOGRAPHICS MODULE  
(DH)**

*IF EditQre = No [EditQre = 2]*

|  
ELSE

| **HHNO**

| Household Number

| Range: 1..9

|  
END FILTER

*IF EditQre <> Yes [EditQre <> 1]*

|  
| *IF SFile.SEARCH (FFWKey) [SFile.SEARCH FFWKey]*

| |  
| | *IF (HHNo = 1) AND (AdrCheck <> Satisfied) [HHNo = 1 AND AdrCheck <>*  
| | *2]*

| | | **ADRFIELD**

| | | INTERVIEWER: Please enter the first ten characters of the first line of the address  
taken from A.R.F.

| | | address label.

| | | Make sure to type it exactly as it is printed.

| | | String: 10

| | |  
| | | END FILTER

| |  
| | END FILTER

|  
END FILTER

**FIRST**

INTERVIEWER: For your information:..

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

*IF EditQre <> Yes [EditQre <> 1]*

|  
| *IF HHFfw.SEARCH (FFWKey) [HHFfw.SEARCH FFWKey]*

|  
| ELSE

| | **FFWBAD**

| | INTERVIEWER: There is a problem with the feed forward data.

| | Please contact support.  
| | 1 Press <1> and <Enter> to continue.  
| |  
| END FILTER  
|  
END FILTER

### **INTDAT**

INTERVIEWER: Today's date.

Amend if not correct.

Else, press <Enter> to continue.

*IF Household Number > 1 [HHNo > 1]*

|  
ELSE

| **DHSAMEH** WHETHER INTERVIEWING AT SAME ADDRESS AS LAST TIME

| ASK or CODE: Are you living at the same address as when we last interviewed you?

| 1 Yes

| 2 No

|  
END FILTER

### **DHINT**

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

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

INTERVIEWER: Enter 1 to continue.

Range: 1..1

*IF QHD.NOFMov > 0 [NOFMov > 0]*

| **DHBACK** NAMES OF PEOPLE WHO HAVE MOVED BACK IN

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

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

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

|  
| CODE ALL THAY APPLY.

```

| 01
| 02
| 03
| 04
| 05
| 06
| 07
| 08
| 09
| 10
| 11
| 12
| 96 None of these
| [code maximum 12 out of 13 possible responses]

```

```

| END FILTER

```

```

| LOOP FOR P1:= 1 TO 16

```

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| IF (P1 <= HHPPrev) OR ((P1 > HHPPrev) AND (P[P1 - 1].DhElse = Yes)) [P1 <=
| HHPPrev OR P1 > HHPPrev AND PP1 - 1.DhElse = Yes]
|
| IF (((HFFW.P.DHName = Yes) OR (HFFW.P.DHWhat = LivElsM)) OR (DhBack
| = P1)) OR ((P1 > 1) AND (P[P1 - 1].DhElse = Yes)) [HFFW.P.DHName = 1 OR
| HFFW.P.DHWhat = 3 OR DhBack = P1 OR P1 > 1 AND PP1 - 1.DhElse = Yes]
|
| IF QHD.QAHD.P.PEElseOnly = No [PEElseOnly = 2]
|
| IF Person number in Household Grid. <= Complete household size (by
| previous wave) [Person <= HHPPrev]
|
| IF whether died = Yes [Dead = 1]
|
| ELSE
|
| DHNAME WHETHER STILL LIVES HERE/AT INSTITUTION
|
| Does live ?
| 1 Yes
| 2 No
|
| END FILTER
|
| IF whether still lives here/at institution = Yes [DhName = 1]
|
| ELSE
|
| IF (DhName = No) AND (Dead <> Yes) [DhName = 2 AND Dead <>
| 1]
|
| DHWHAT REASON FOR NOT LIVING HERE

```

May I ask what has happened to ?

- 1 Deceased
- 2 Living elsewhere - relationship ended
- 3 Living elsewhere - moved into a nursing/residential home
- 4 Living elsewhere - other reason
- 5

*IF reason for not living here = Deceased [DhWhat = 1]*

**DHEIINT**

I am sorry to hear that has passed away. I just need to ask a few questions to check that we have the correct information about him/her.

INTERVIEWER: Press 1 and <Enter> to continue.

Range: 1..1

END FILTER

END FILTER

END FILTER

*IF QHD.QAHD.P.PConfirm = No [PConfirm = 2]*

**DHNN CORRECT FIRST NAME**

INTERVIEWER: Enter correct first name.

String: 20

ELSE

*IF QHD.QAHD.P.PConfirm = Yes [PConfirm = 1]*

*IF (DhName = Yes) OR (DhWhat IN [LivElsM, Deceased]) [DhName = 1 OR DhWhat = 3, 1]*

**DHNC WHETHER FIRST NAME CORRECT**

INTERVIEWER: ASK OR CODE: Is the first name () correct?

- 1 Yes
- 2 No

END FILTER

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| | | | END FILTER
| | | | IF (DhName = Yes) OR (DhWhat IN [LivElsM, Deceased]) [DhName = 1
| | | | OR DhWhat = 3, 1]
| | | | IF HSE @/^DhNN's sex. = RESPONSE [Sex = RESPONSE]
| | | | DHSEXC WHETHER SEX CORRECT
| | | | ASK OR CODE: Can I just check, [^correct first name] ?
| | | | 1 Yes
| | | | 2 No
| | | | END FILTER
| | | | IF (DhSexC = No) OR (Sex <> RESPONSE) [DhSexC = 2 OR Sex <>
| | | | RESPONSE]
| | | | DHSEX SEX
| | | | INTERVIEWER: Ask or code [^correct first name]'s sex.
| | | | 1 Male
| | | | 2 Female
| | | | END FILTER
| | | | IF (DhName = Yes) OR (DhWhat IN [LivElsM, Deceased]) [DhName = 1
| | | | OR DhWhat = 3, 1]
| | | | IF HSE @/^DhNN's date of birth = RESPONSE [DoB = RESPONSE]
| | | | / / / /
| | | | DHDOBC WHETHER DATE OF BIRTH CORRECT
| | | | Can I just check, [^correct first name]'s date of birth ?
| | | | 1 Yes
| | | | 2 No
| | | | END FILTER
| | | | IF (DhDoBC = No) OR (DoB <> RESPONSE) [DhDoBC = 2 OR DoB <>
| | | | RESPONSE]
| | | | DHDOB DATE OF BIRTH
| | | | What [^correct first name]'s date of birth?
| | | | END FILTER
| | | | IF (DhName = Yes) OR (DhWhat IN [LivElsM, Deceased]) [DhName = 1

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| | | | OR DhWhat = 3, 1]
| | | | |
| | | | | IF date of birth = RESPONSE [DhDob = RESPONSE]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF age at last birthday = DONTKNOW [DhAge = DONTKNOW]
| | | | |
| | | | | DHEAG AGE AT LAST BIRTHDAY (AGEBANDS)
| | | | |
| | | | | Is [^correct first name] ... READ OUT ...
| | | | | 1 ... Under 16
| | | | | 2 16 to 29
| | | | | 3 30 to 49
| | | | | 4 50 to 69
| | | | | 5 70 to 89
| | | | | 6 or, 90 or over?
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (DhName = Yes) AND (DhAge >= 16) [DhName = 1 AND DhAge >=
| | | | | 16]
| | | | |
| | | | | DHWORK WHETHER IN PAID EMPLOYMENT
| | | | |
| | | | | Last week was [^correct first name] in paid employment including
| | | | | being away temporarily from a job would normally be doing?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (DhName = Yes) OR (DhWhat IN [LivEIsM, Deceased]) [DhName = 1
| | | | | OR DhWhat = 3, 1]
| | | | |
| | | | | LOOP FOR R1:= 1 TO 16
| | | | |
| | | | | IF (RPers < PPers) AND (((RPres = Yes) OR (DMWhat = Deceased))
| | | | | OR ((DMWhat = LivEIsM) AND ((HFFW.P.ELSA = Yes) OR
| | | | | (HFFW.P.Partner = Yes)))) [RPers < PPers AND RPres = 1 OR DMWhat =
| | | | | Deceased OR DMWhat = LivEIsM AND HFFW.P.ELSA = 1 OR
| | | | | HFFW.P.Partner = 1]
| | | | |
| | | | | IF (R = RESPONSE) AND NOT ((R = Child) OR (R = Sibling)) [R =
| | | | | RESPONSE AND NOT R = 3 OR R = 13]
| | | | |
| | | | | DHRC WHETHER RELATIONSHIP TO OTHER HOUSEHOLD

```

MEMBERS ARE CORRECT

And, 's ?

1 Yes

2 No

END FILTER

*IF (DhRC = No) OR (R <> RESPONSE) [DhRC = 2 OR R <>  
RESPONSE]*

**DHR RELATIONSHIP TO OTHER HOUSEHOLD MEMBERS  
SHOW CARD A1**

What is 's relationship to . Please choose a number from this card.

INTERVIEWER: Code 2 for Civil Partners.

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step son/daughter/child of partner
- 07 Son/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative
- 22 Other non-relative
- 96 (THIS CODE NOT USED)

END FILTER

END FILTER

*IF reason for not living here = Deceased [DhWhat = 1]*

**DHDEAD YEAR OF DEATH**

?

INTERVIEWER: Enter the year at this question.  
Range: 1900..2050

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

**DHMON MONTH OF DEATH**

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

INTERVIEWER: Enter the month at this question.

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

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

**DHDAY DAY OF DEATH**

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

INTERVIEWER: Enter the Day at this question.  
Range: 1..31

END FILTER

END FILTER

END FILTER

*IF (DhWhat IN [LivElsr .. LivElsO]) OR reason for not living here =  
NONRESPONSE [DhWhat = 2 , 3, 4 OR DhWhat = NONRESPONSE]*

**DHLEFTY** YEAR MOVED OUT OF HOUSEHOLD

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

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**DHLEFTM** MONTH MOVED OUT OF HOUSEHOLD

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

INTERVIEWER: Enter the month at this question.

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

*IF (HFFW.P.ELSA = Yes) OR (HFFW.P.Partner = Yes) [HFFW.P.ELSA = 1 OR HFFW.P.Partner = 1]*

*IF reason for not living here IN [LivElsr, LivElsO] [DhWhat = 2, 4]*

**DHARFB**

INTERVIEWER: This is a split household. Start ARF B and attempt to find follow-up address for them.

Press 1 and <Enter> to continue.

Range: 1..1

*IF (DhWhat IN [LivElsr .. LivElsO]) AND (Pilot <> Yes) [DhWhat = 2*

*, 3, 4 AND Pilot <> 1]*

**DHMOV**

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

INTERVIEWER: Press 1 and <Enter> to continue.

Range: 1..1

END FILTER

END FILTER

END FILTER

*IF (Person > HHPrev) OR (DhBack = Person) [Person > HHPrev OR DhBack = Person]*

**DHJOINY YEAR MOVED INTO HOUSEHOLD**

When did [^correct first name] move into this household?

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

**DHJOINM MONTH MOVED INTO HOSEHOLD**

(When did [^correct first name] move into this household?)

INTERVIEWER: Enter the month at this question.

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

END FILTER

END FILTER

*IF Person number in Household Grid. >= Complete household size (by previous wave) [Person >= HHPrev]*

**DHELSE** WHETHER ANYONE ELSE LIVES HERE

Does anyone else live here ?

- 1 Yes
- 2 No

*IF (DhElse = Yes) AND ((ChTot - ChCov) > 0) [DhElse = 1 AND ChTot - ChCov > 0]*

**DHELSEC** WHETHER IS CHILD OF SOMEONE LIVING HERE

Is this person a child of someone who lives here?

- 1 Yes
- 2 No

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

**DHELSCY** WHETHER IS CHILD RECORDED AT PREVIOUS INTERVIEW

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

CODE ONE ONLY.

- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08
- 09
- 10
- 11
- 12
- 13
- 14
- 15
- 16
- 96 No, it is someone else

END FILTER

```

| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | ELSE
| | | |
| | | | IF ((HFFW.P.DHWhat IN [LivElsr .. LivElsO]) AND (DhBack = RESPONSE))
| | | | AND NOT (P1 IN DhBack) [HFFW.P.DHWhat = 2 , 3, 4 AND DhBack =
| | | | RESPONSE AND NOT P1 = DhBack]
| | | |
| | | | IF QHD.QAHD.P.PElseOnly = No [PElseOnly = 2]
| | | |
| | | | IF Person number in Household Grid. <= Complete household size (by
| | | | previous wave) [Person <= HHPrev]
| | | |
| | | | IF whether died = Yes [Dead = 1]
| | | |
| | | | ELSE
| | | |
| | | | DHNAME WHETHER STILL LIVES HERE/AT INSTITUTION
| | | |
| | | | Does live ?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | END FILTER
| | | |
| | | | IF whether still lives here/at institution = Yes [DhName = 1]
| | | |
| | | | ELSE
| | | |
| | | | IF (DhName = No) AND (Dead <> Yes) [DhName = 2 AND Dead <>
| | | | 1]
| | | |
| | | | DHWHAT REASON FOR NOT LIVING HERE
| | | |
| | | | May I ask what has happened to ?
| | | | 1 Deceased
| | | | 2 Living elsewhere - relationship ended
| | | | 3 Living elsewhere - moved into a nursing/residential home
| | | | 4 Living elsewhere - other reason
| | | | 5
| | | |
| | | | IF reason for not living here = Deceased [DhWhat = 1]
| | | |
| | | | DHEIINT
| | | |
| | | | I am sorry to hear that has passed away. I just need to ask a few
| | | | questions to check that we have the correct information about
| | | | him/her.

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| | | | | RESPONSE]
| | | | |
| | | | | DHSEX SEX
| | | | |
| | | | | INTERVIEWER: Ask or code [^correct first name]'s sex.
| | | | | 1 Male
| | | | | 2 Female
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (DhName = Yes) OR (DhWhat IN [LivElsM, Deceased]) [DhName = 1
| | | | | OR DhWhat = 3, 1]
| | | | |
| | | | | IF HSE @/^DhNN's date of birth = RESPONSE [DoB = RESPONSE]
| | | | |
| | | | |
| | | | | DHDOBC WHETHER DATE OF BIRTH CORRECT
| | | | |
| | | | | Can I just check, [^correct first name]'s date of birth ?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (DhDoBC = No) OR (DoB <> RESPONSE) [DhDoBC = 2 OR DoB
| | | | | <> RESPONSE]
| | | | |
| | | | | DHDOB DATE OF BIRTH
| | | | |
| | | | | What [^correct first name]'s date of birth?
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (DhName = Yes) OR (DhWhat IN [LivElsM, Deceased]) [DhName = 1
| | | | | OR DhWhat = 3, 1]
| | | | |
| | | | | IF date of birth = RESPONSE [DhDob = RESPONSE]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF age at last birthday = DONTKNOW [DhAge = DONTKNOW]
| | | | |
| | | | |
| | | | | DHEAG AGE AT LAST BIRTHDAY (AGEBANDS)
| | | | |
| | | | | Is [^correct first name] ... READ OUT ...
| | | | | 1 ... Under 16
| | | | | 2 16 to 29
| | | | | 3 30 to 49
| | | | | 4 50 to 69

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| | | | | 5 70 to 89
| | | | | 6 or, 90 or over?
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | | IF (DhName = Yes) AND (DhAge >= 16) [DhName = 1 AND DhAge >=
| | | | | 16]
| | | | |
| | | | | DHWORK WHETHER IN PAID EMPLOYMENT
| | | | |
| | | | | Last week was [^correct first name] in paid employment including
| | | | | being away temporarily from a job would normally be doing?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (DhName = Yes) OR (DhWhat IN [LivElsM, Deceased]) [DhName = 1
| | | | | OR DhWhat = 3, 1]
| | | | |
| | | | | LOOP FOR R1:= 1 TO 16
| | | | |
| | | | | IF (RPers < PPers) AND (((RPres = Yes) OR (DMWhat = Deceased))
| | | | | OR ((DMWhat = LivElsM) AND ((HFFW.P.ELSA = Yes) OR
| | | | | (HFFW.P.Partner = Yes)))) [RPers < PPers AND RPres = 1 OR
| | | | | DMWhat = Deceased OR DMWhat = LivElsM AND HFFW.P.ELSA = 1
| | | | | OR HFFW.P.Partner = 1]
| | | | |
| | | | | IF (R = RESPONSE) AND NOT ((R = Child) OR (R = Sibling)) [R
| | | | | = RESPONSE AND NOT R = 3 OR R = 13]
| | | | |
| | | | | DHRC WHETHER RELATIONSHIP TO OTHER HOUSEHOLD
MEMBERS ARE CORRECT
| | | | |
| | | | | And, 's ?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (DhRC = No) OR (R <> RESPONSE) [DhRC = 2 OR R <>
| | | | | RESPONSE]
| | | | |
| | | | | DHR RELATIONSHIP TO OTHER HOUSEHOLD MEMBERS
SHOW CARD A1
| | | | |
| | | | | What is 's relationship to . Please choose a number from this card.

```

INTERVIEWER: Code 2 for Civil Partners.

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step son/daughter/child of partner
- 07 Son/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative
- 22 Other non-relative
- 96 (THIS CODE NOT USED)

END FILTER

END FILTER

*IF reason for not living here = Deceased [DhWhat = 1]*

**DHDEAD** YEAR OF DEATH

?

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

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

**DHMON** MONTH OF DEATH

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

INTERVIEWER: Enter the month at this question.

- 01 January
- 02 February

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

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

**DHDAY DAY OF DEATH**

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

INTERVIEWER: Enter the Day at this question.  
Range: 1..31

END FILTER

END FILTER

END FILTER

*IF (DhWhat IN [LivElsr .. LivElsO]) OR reason for not living here = NONRESPONSE [DhWhat = 2 , 3, 4 OR DhWhat = NONRESPONSE]*

**DHLEFTY YEAR MOVED OUT OF HOUSEHOLD**

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

INTERVIEWER: Enter the year at this question.  
Range: 1900..2050

**DHLEFTM MONTH MOVED OUT OF HOUSEHOLD**

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

INTERVIEWER: Enter the month at this question.

- 01 January

```

| | | | | 02 February
| | | | | 03 March
| | | | | 04 April
| | | | | 05 May
| | | | | 06 June
| | | | | 07 July
| | | | | 08 August
| | | | | 09 September
| | | | | 10 October
| | | | | 11 November
| | | | | 12 December
| | | | | 13 Winter (start of year)
| | | | | 14 Spring
| | | | | 15 Summer
| | | | | 16 Autumn
| | | | | 17 Winter (end of year)
| | | | | IF (HFFW.P.ELSA = Yes) OR (HFFW.P.Partner = Yes) [HFFW.P.ELSA
| | | | | = 1 OR HFFW.P.Partner = 1]
| | | | | IF reason for not living here IN [LivElsr, LivElsO] [DhWhat = 2, 4]
| | | | |
| | | | | DHARFB
| | | | |
| | | | | INTERVIEWER: This is a split household. Start ARF B and attempt to find
follow-up | | | | | address for them.
| | | | |
| | | | | Press 1 and <Enter> to continue.
| | | | | Range: 1..1
| | | | | IF (DhWhat IN [LivElsr .. LivElsO]) AND (Pilot <> Yes) [DhWhat =
| | | | | 2 , 3, 4 AND Pilot <> 1]
| | | | |
| | | | | DHMOV
| | | | |
| | | | | We may need to collect some more details about [^correct first
| | | | | name] but we will come back to this later.
| | | | |
| | | | | INTERVIEWER: Press 1 and <Enter> to continue.
| | | | | Range: 1..1
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER

```

```

| | | | | END FILTER
| | | | |
| | | | | IF (Person > HHPprev) OR (DhBack = Person) [Person > HHPprev OR
| | | | | DhBack = Person]
| | | | |
| | | | | DHJOINY YEAR MOVED INTO HOUSEHOLD
| | | | | When did [^correct first name] move into this household?
| | | | |
| | | | | INTERVIEWER: Enter the year at this question.
| | | | | Range: 1900..2050
| | | | |
| | | | | DHJOINM MONTH MOVED INTO HOSEHOLD
| | | | | (When did [^correct first name] move into this household?)
| | | | |
| | | | | INTERVIEWER: Enter the month at this question.
| | | | | 01 January
| | | | | 02 February
| | | | | 03 March
| | | | | 04 April
| | | | | 05 May
| | | | | 06 June
| | | | | 07 July
| | | | | 08 August
| | | | | 09 September
| | | | | 10 October
| | | | | 11 November
| | | | | 12 December
| | | | | 13 Winter (start of year)
| | | | | 14 Spring
| | | | | 15 Summer
| | | | | 16 Autumn
| | | | | 17 Winter (end of year)
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF Person number in Household Grid. >= Complete household size (by
| | | | | previous wave) [Person >= HHPprev]
| | | | |
| | | | | DHELSE WHETHER ANYONE ELSE LIVES HERE
| | | | |
| | | | | Does anyone else live here ?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | IF (DhElse = Yes) AND ((ChTot - ChCov) > 0) [DhElse = 1 AND ChTot -
| | | | | ChCov > 0]
| | | | |

```



**DHEXIT**

So that we can be sure that we understand the end of 's life, I'd like to come back to talking about towards the end of my visit.

INTERVIEWER: Remember to record details of deceased at section D of ARF.

INTERVIEWER:

Press 1 and <Enter> to continue.

Range: 1..1

**DHEXINT BEST PERSON TO SPEAK TO ABOUT EXIT INTERVIEW**

Who would be the best person to speak to about ?

97 : Not a household member

Range: 1..97

END FILTER

*IF (((HFFW.P[myloop].ELSA = Yes) OR (HFFW.P.Partner = Yes)) AND  
/ (QAHD.P.DhWhat = LivElsM)) OR ((HFFW.P[myloop].DHWhat = LivElsM) AND  
/ NOT (DhBack = DhResp)) [HFFW.P.ELSA = 1 OR HFFW.P.Partner = 1 AND  
/ QAHD.P.DhWhat = 3 OR HFFW.P.DHWhat = 3 AND NOT DhBack = DhResp]*

**DHMIPRX WHETHER PARTICIPANT COULD HAVE INSTITUTION INTERVIEW IN PERSON**

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

Do you think that will be able to answer the questions on own behalf if we were to approach ?

1 Yes

2 No

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

**DHMIPWP WHETHER SOMEONE COULD DO PROXY INSTITUTION INTERVIEW**

Is there someone who could answer on behalf?

1 Yes

2 No

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

**DHMIPWH DETAILS OF PROPOSED PROXY INSTITUTION INTERVIEW**

RESPONDENT

| | | |  
| | | | INTERVIEWER: Who could answer on behalf of ?

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

| | | | 97 : Someone else

| | | | INTERVIEWER:  
| | | | Please record details on ARF at section C.  
| | | | Range: 1..97

| | | | END FILTER

| | | | END FILTER

| | | | END FILTER

**DHRESP** PERSON WHO ANSWERED THE HOUSEHOLD GRID.

INTERVIEWER: Code who answered the Household Grid.

CODE ONE ONLY.

97 : Not a  
Household Member  
Range: 1..97

*IF person who answered the Household Grid. = 97 [DhResp = 97]*

| | | | **DHWARN**

| | | | INTERVIEWER: The Household Questionnaire should only be answered by a non-  
| | | | household member if

| | | | all household members eligible for interview are incapacitated.

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

| | | | END FILTER

*IF (EligBT >= 1) AND (DhResp = RESPONSE) [EligBT >= 1 AND DhResp =  
RESPONSE]*

| | | | LOOP FOR PP:= 1 TO 16

| | | | IF (QAHD.QAuxChild.Covered <> Yes) AND (ChCovered <> Yes)

| | | | [QAHD.QAuxChild.Covered <> Yes AND ChCovered <> Yes]

IF (ParNr > 0) AND (LEN (Parent) > 1) [ParNr > 0 AND LEN Parent > 1]

IF @/What is the first name of th = RESPONSE [Name = RESPONSE]

**DHCGN** WHETHER CHILD DETAILS CORRECT

Our records show that when we last interviewed , had a child called , .

Are these details correct?

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

ELSE

IF First line of new parents = Yes [Dh1st = 1]

**DHCH** WHETHER HAS CHILDREN NOT LIVING HERE

Do you have any children who do not live here?

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

- 1 Yes
- 2 No

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

**DHNCH** NUMBER OF LIVING CHILDREN

In total, how many living children do you have?

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

Range: 0..20

END FILTER

END FILTER

IF ((DhCgN IN [Corr, Chang]) OR (DhC <= DhNCh)) AND (DhCh <> No) [DhCgN = 1, 2 OR DhC <= DhNCh AND DhCh <> 2]

IF (Name = RESPONSE) AND (DhCgN <> Corr) [Name = RESPONSE AND DhCgN <> 1]

**DHNC** WHETHER CHILD'S FIRST NAME CORRECT

INTERVIEWER: ASK OR CODE: Is the first name () correct?

- 1 Yes
- 2 No

END FILTER

*IF (DhNC = No) OR (Name <> RESPONSE) [DhNC = 2 OR Name <> RESPONSE]*

**DHCNA** FIRST NAME OF CHILD

What is the first name of child?  
String: 20

*IF (Sex = RESPONSE) AND (DhCgN <> Corr) [Sex = RESPONSE AND DhCgN <> 1]*

**DHSEX** WHETHER CHILD'S SEX CORRECT

ASK OR CODE: Can I just check, is [^first name of child] ?

- 1 Yes
- 2 No

END FILTER

*IF (DHSexC = No) OR (Sex <> RESPONSE) [DHSexC = 2 OR Sex <> RESPONSE]*

**DHCS** CHILD'S SEX

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

- 1 Male
- 2 Female

*IF (DoB = RESPONSE) AND (DhCgN <> Corr) [DoB = RESPONSE AND DhCgN <> 1]*

**DHDOB** WHETHER CHILD'S DATE OF BIRTH CORRECT

Can I just check, [^first name of child]'s date of birth ?

- 1 Yes
- 2 No

END FILTER

*IF (DHDoBC = No) OR (DoB <> RESPONSE) [DHDoBC = 2 OR DoB <> RESPONSE]*

**DHCDB** CHILD'S DATE OF BIRTH

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

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

**DHCAG CHILD'S AGE AT LAST BIRTHDAY**

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

LOOP FOR chloop:= 1 TO 16

IF Eligible for interview AFTER grid = Yes [EligB = Yes]

IF (CRel = RESPONSE) AND NOT ((CRel = Child) OR (CRel = Sibling)) [CRel = RESPONSE AND NOT CRel = 3 OR CRel = 13]

**DHRC WHETHER CONFIRMS RELATIONSHIP TO CHILD**

And, is [^first name of child] ?

- 1 Yes
- 2 No

END FILTER

IF (DHRC = No) OR (CRel <> RESPONSE) [DHRC = 2 OR CRel <> RESPONSE]

**DHCR RELATIONSHIP TO CHILD**

SHOW CARD A1...What is [^first name of child]'s relationship to ? Please choose a number from this card.

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step son/daughter/child of partner
- 07 Son/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative



```

| | 11
| | 12
| | 13
| | 14
| | 15
| | 16
| | [code maximum 16 out of 16 possible responses]
| |
| | END FILTER
| |
| | END FILTER

| | LOOP FOR myloop:= 1 TO 16
| |
| | IF Will be computed / sorted out! < 1 [IndStat < 1]
| |
| | ELSE
| |
| | IF Will be computed / sorted out! >= 1 [IndStat >= 1]
| |
| | IF (CoupleN[myloop] IN [1 .. 16]) AND (IndStat] >= 1) [CoupleN = 1 - 16
| | / | / AND IndStat[CoupleN[myloop]] >= 1]
| |
| | IF myloop < CoupleN[myloop] [myloop < CoupleN]
| |
| | | | DHIASEP WHETHER KEEP FINANCES SEPERATE
| | | |
| | | | Later in the interview, I would like to ask some questions about finances
| | | | generally, for example income and savings.
| | | | Can I just check, keep finances totally separate?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | END FILTER
| | | |
| | | | ELSE
| | | |
| | | | IF (CoupleN[myloop] IN [1 .. 16]) AND ((QAHD.P].DhWhat = LivElsM)
| | | | / | | / AND (Pilot <> Yes)) [CoupleN = 1 - 16 AND QAHD.P.DhWhat = 3 AND Pilot
| | | | / | | / <> 1]
| | | |
| | | | DHIASEP WHETHER KEEP FINANCES SEPERATE
| | | |
| | | | Later in the interview, I would like to ask some questions about finances
| | | | generally, for example income and savings.
| | | | Can I just check, keep finances totally separate?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | END FILTER
| | | |
| | | |

```

| | END FILTER

| | END FILTER

| END FILTER

| *IF Total Eligible for interview AFTER DHPProxy, excluding respondents in institution. = 2 [EligMT = 2]*

| | **DHNOW** WHETHER CONFIRMS AUTOMATIC SELECTION OF RESPONDENTS TO INDIVIDUAL SESSIONS

| | INTERVIEWER: Are you about to begin a concurrent interview with ?

| | The order in which respondents will appear in the session would be:

- | | 1 Yes
- | | 2 No

| | *IF whether confirms automatic selection of respondents to individual sessions = Yes [DhNow = 1]*

| | **DHSURY** CONFIRM AUTOMATIC SELECTION OF RESPONDENTS TO INDIVIDUAL SESSIONS

| | INTERVIEWER: Code 1 here to confirm that Individual Session one will be a concurrent interview with

| | The order in which respondents will appear in the session will be :

| | Note : This cannot then be changed.

- | | 1 Correct
- | | 2 Not correct

| | END FILTER

| END FILTER

LOOP FOR myloop:= 1 TO 16

| | *IF whether confirms automatic selection of respondents to individual sessions <> Yes [DhNow <> 1]*

| |

```

| | IF whether keep finances seperate = No [DhlaSep = 2]
| | |
| | | IF QAHD.P].DhName = Yes [QAHD.P.DhName = 1]
| | |
| | | DHIAWHO PROPOSED RESPONDENT FOR IA
| | |
| | | INTERVIEWER: Check ARF label for the number of the respondent who
| | | answered the finances
| | | questions last time. Suggest to the respondent that the same person answers IA
| | | this time.
| | |
| | | READ OUT: 'I will only need to ask one of you the questions about your finances.
| | | Which
| | | of you would be most able to answer these questions?'
| | |
| | | CODE ONE ONLY.
| | | 1
| | | 2 [^dmname[couplen[myloop]]]
| | |
| | | END FILTER
| | |
| | | END FILTER
| | |
| | | END FILTER

| | IF Set to Yes if EligCt=2 and DHH = Yes [DH2C = 1]
| | |
| | | ELSE
| | |
| | | IF Total Eligible for interview AFTER DHPProxy = 1 [EligCT = 1]
| | | |
| | | | ELSE
| | | |
| | | | IF Total Eligible for interview AFTER DHPProxy, excluding respondents in
| | | | institution. > 1 [EligMT > 1]
| | | |
| | | | DHHOU PROPOSED RESPONDENT FOR HO
| | | |
| | | | INTERVIEWER: Check ARF label for the number of the respondent who answered
| | | | the housing
| | | | questions last time. Suggest to the respondent that the same person answers HO
| | | | this time.
| | | |
| | | | READ OUT: 'Some questions in the interview are about your household's housing
| | | | and
| | | | housing finances. I will only need to ask these to one person.
| | | |
| | | |

```

```
| | | Which of you would be the
| | | most able to answer questions about housing?'
| | | CODE ONE ONLY.
| | |
| | | Range: 1..97
| | |
| | | END FILTER
|
END FILTER
```

## **HILEN**

INTERVIEWER: Enter length of household interview in minutes.  
Range: 0..9997

```
IF @/@/INTERVIEWER: Enter length <> EMPTY [HILen <> EMPTY]
```

```
| IF Total Eligible for interview AFTER grid >= 1 [QHD.EligBT >= 1]
```

```
| | ELIGIBLE
```

```
| | INTERVIEWER: For your information:
```

```
| | Write the names of all the eligible respondents  
| | on ARF at E2.
```

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

```
| | ELSE
```

```
| | NOINTS
```

```
| | INTERVIEWER: There is no-one eligible for an interview!
```

```
| | Please explain there has been an error  
| | in our records and in fact no-one is eligible for interview.
```

```
| | Apologise and thank the household  
| | for their time.
```

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

```
| | END FILTER
```

```
|
END FILTER
```

```
IF (VAllocP <> RESPONSE) OR (EditQre = Yes) [VAllocP <> RESPONSE OR  
EditQre = 1]
```

```
| LOOP FOR Loop:= 1 TO 2
```

```
| |
| | IF (Loop = 1) OR ((AllocP[Loop - 1] = RESPONSE) AND ((AllocP[Loop - 1] <=
| | 16) OR (AllocP[Loop - 1] = 96))) [Loop = 1 OR AllocPLoop - 1 = RESPONSE AND
| | AllocPLoop - 1 <= 16 OR AllocPLoop - 1 = 96]
```

```
| |
| | ALLOCP
```

```
| | INTERVIEWER: Please enter the person number of the person to be interviewed in
this session
```

```
| | (Session Number ).
```

```
| | 97 : No one else
```

```
| | Range: 1..97
```

```
| | END FILTER
```

```
| END FILTER
```

```
IF @/INTERVIEWER: Please enter th = RESPONSE [AllocP = RESPONSE]
```

```
| IF @/*** Individual Session ^indn <> RESPONSE [PersDisp <> RESPONSE]
```

```
| | SESSCONF
```

```
| | INTERVIEWER: Please confirm your selection of respondents for this session
(number ).
```

```
| | The
| | person(s) now selected for this session are:
```

```
| | Is this correct?
```

```
| | 1 Yes
```

```
| | 2 No
```

```
| | END FILTER
```

**INDIVIDUAL  
DEMOGRAPHICS MODULE  
(DI)**

**PERSDISP**

\*\*\* Individual Session \*\*\*

INTERVIEWER: For your information...  
...the person(s) allocated to this session are:

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

END FILTER

*IF @/INTERVIEWER: Please confirm = Yes [SessConf = 1]*

LOOP FOR Loop:= 1 TO NumP

*IF (EditQre <> Yes) AND (IndSer = RESPONSE) [EditQre <> 1 AND IndSer =  
RESPONSE]*

*IF IndFfw.SEARCH (IndSer[Loop]) [IndFfw.SEARCH IndSer]*

ELSE

*IF Pilot <> Yes [Pilot <> 1]*

**FFWBAD**

INTERVIEWER:There is no feed forward data for person .  
If this is a new respondent, press  
<1> and <Enter> to continue.

If this respondent has been interviewed before,  
please contact the Helpline.  
1 Press <1> and <Enter> to continue.

END FILTER

END FILTER

END FILTER

END FILTER

LOOP FOR Loop:= 1 TO NumP

**ADRESP**

INTERVIEWER: Who is answering on behalf of ?

01

02

03

04

05

06

07

08

09

10

11

12

13

14

15

16

97 Not a household member

END FILTER

**IINTDAT**

INTERVIEWER: Today's date is displayed below.

Please amend it if it's not correct.

**DIINTA**

I'd like to ask a few (more) questions about and family.

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

**DIDOB** WHETHER DATE OF BIRTH CORRECT

Can I just check that your date of birth is ?

1 Correct

2 Incorrect

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

**DIDBN** DATE OF BIRTH

What is your date of birth?

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

**DIAG** AGE AT LAST BIRTHDAY

What was your age last birthday?

Range: 0..120

ELSE

*IF NOT (DiInt IN [1 .. 16]) [NOT DiInt = 1 - 16]*

**DIPRE** RELATIONSHIP TO PROXY  
SHOW CARD A1

(Can I just check,) what is your relationship to ?

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step son/daughter/child of partner
- 07 Son/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative
- 22 Other non-relative
- 96 (THIS CODE NOT USED)

END FILTER

**DISEX** WHETHER SEX CORRECT  
ASK OR CODE: Can I just check that ?

- 1 Yes
- 2 No

*IF whether sex correct = Yes [DiSexC = 1]*

ELSE

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

**DISEX** SEX

INTERVIEWER: Code 's sex.

- 1 Male
- 2 Female

END FILTER

END FILTER

**DIMAR** MARITAL STATUS

SHOW CARD B1

What is current legal marital status?

- 01 Single, that is never married
- 02 Married, first and only marriage
- 03 A civil partner in a legally-recognised Civil Partnership
- 04 Remarried, second or later marriage
- 05 Legally separated
- 06 Divorced
- 07 Widowed
- 08 Spontaneous only - In a legally-recognised Civil Partnership and separated

from

his/her civil partner

09 Spontaneous only - Formerly a civil partner, the Civil Partnership is now legally dissolved

10 Spontaneous only - A surviving civil partner: his/her partner having since died

11 Spontaneous only - A civil partner and has been married or in another Civil Partnership before

*IF NOT (MiRel IN [Spouse, Part]) AND (PMar <> Yes) [NOT MiRel = 1, 2 AND PMar <> 1]*

**MISPOU** DOES RESPONDENT IN INSTITUTION HAVE A PARTNER

INTERVIEWER: Ask or code.

have a partner?

- 1 Yes
- 2 No

END FILTER

*IF ((MiRel IN [Spouse, Part]) OR (MiSpou = Yes)) OR (PMar = Yes) [MiRel = 1, 2 OR MiSpou = 1 OR PMar = 1]*

**MILIVE** WHERE DOES PARTNER OF RESPONDENT IN INSTITUTION LIVE

INTERVIEWER: Ask or code.

Where does their spouse or partner live?

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

**MISINT** HAS PARTNER OF RESPONDENT IN INSTITUTION BEEN INTERVIEWED IN WAVE 3

INTERVIEWER CODE:

| | | Has spouse/partner already had a Wave 3 ELSA interview?

| | | INTERVIEWER: Refer to front of ARF.

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | | *IF (IGCINHH <> Yes) AND (IFFW.DiGrand <> Yes) [IGCINHH <> Yes AND*  
| | | *IFFW.DiGrand <> Yes]*

| | | **DIGRAN** WHETHER HAS ANY GRANDCHILDREN OR GREAT-  
GRANDCHILDREN

| | | have any living grandchildren or great-grandchildren?

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | | *IF IFFW.DiGrand = Yes [IFFW.DiGrand = Yes]*

| | | **DIGNMYC** WHETHER SAME NUMBER OF LIVING GRANDCHILDREN OR  
GREAT-GRANDCHILDREN AS LAST INTERVIEW

| | | Last time we interviewed , told us that had living grandchildren or great-  
grandchildren. Is this still the case?

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | | *IF ((IGCINHH = Yes) AND (IFFW.DiGrand <> Yes)) OR ((DiGran = Yes) OR*  
| | | *(DiGnMyC = No)) [IGCINHH = Yes AND IFFW.DiGrand <> Yes OR DiGran = 1*  
| | | *OR DiGnMyC = 2]*

| | | **DIGNMY** NUMBER OF LIVING GRANDCHILDREN OR GREAT-  
GRANDCHILDREN

| | | How many living grandchildren or great-grandchildren have?

| | | Range: 0..97

| | | *IF number of living brothers or sisters > 0 [IFFW.DiSib > 0]*

| | | **DISIBC** WHETHER SAME NUMBER OF LIVING BROTHERS OR SISTERS AS  
LAST INTERVIEW

| | | Last time we interviewed , told us that had living brothers or sisters.

| | | still have living brothers or sisters?

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | IF ((DiSibC = No) OR number of living brothers or sisters = NONRESPONSE)  
| | OR number of living brothers or sisters = EMPTY [DiSibC = 2 OR IFFW.DiSib =  
| | NONRESPONSE OR IFFW.DiSib = EMPTY]

| | **DISIB** NUMBER OF LIVING BROTHERS OR SISTERS

| | How many living brothers or sisters have?

| | IF ASKED: Foster/adoptive/step-brothers/sisters can be included.

| | Range: 0..97

| | IF (IFFW.DinMaD <> No) AND (IMaINHH <> Yes) [IFFW.DinMaD <> No  
| | AND IMaINHH <> Yes]

| | **DINMA** WHETHER NATURAL MOTHER ALIVE

| | Is natural mother still alive?

| | 1 Yes

| | 2 No

| | IF whether natural mother alive = Yes [DiNMA = 1]

| | **DIANM** AGE OF NATURAL MOTHER

| | How old is natural mother?

| | Range: 16..120

| | ELSE

| | IF whether natural mother alive = No [DiNMA = 2]

| | **DIMAD** AGE AT WHICH NATURAL MOTHER DIED

| | How old was natural mother when she died?

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

| | Range: 0..120

| | **DICDNM** CAUSE OF DEATH OF NATURAL MOTHER

| | SHOW CARD B2

| | Did natural mother die from any of the conditions on this card?

| | CODE ONE ONLY.

| | 1 Cancer

| | 2 Heart Attack

| | 3 Stroke

| | 4 Other cardiovascular related illness

| | 5 Respiratory disease

| | 96 None of these

| | END FILTER

END FILTER

END FILTER

*IF (IFFW.DinFaD <> No) AND (IPaINHH <> Yes) [IFFW.DinFaD <> No AND  
IPaINHH <> Yes]*

**DINFA** WHETHER NATURAL FATHER ALIVE

Is natural father still alive?

- 1 Yes
- 2 No

*IF whether natural father alive = Yes [DiNFA = 1]*

**DIANF** AGE OF NATURAL FATHER

How old is natural father?

Range: 16..120

ELSE

*IF whether natural father alive = No [DiNFA = 2]*

**DIFAD** AGE AT WHICH NATURAL FATHER DIED

How old was natural father when he died?

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

Range: 0..120

**DICDNF** CAUSE OF DEATH OF NATURAL FATHER

SHOW CARD B2

Did natural father die from any of the conditions on this card?

CODE ONE ONLY.

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

END FILTER

END FILTER

END FILTER

*IF who lived with for most of childhood <> RESPONSE [IFFW.DiKLiv <>*

| | *RESPONSE]*

| | **DIKLIV** WHO LIVED WITH FOR MOST OF CHILDHOOD

| | Who did live with for most of childhood?

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

| | END FILTER

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

| | **DIKLO** OTHER PEOPLE WHO LIVED WITH FOR MOST OF CHILDHOOD

| | INTERVIEWER: write in who respondent lived with.

| | String: 20

| | END FILTER

| | *IF (DiKLiv = RESPONSE) AND (DiKLiv <> ChHome) [DiKLiv = RESPONSE*

| | *AND DiKLiv <> 9]*

| | **DIFJOB** OCCUPATION OF PARENT/CARER WHEN RESPONDENT WAS 14

| | What was main occupation when 14?

- | | 01 Armed Forces
- | | 02 Manager or senior official in someone else's business
- | | 03 Running his own business
- | | 04 Professional or technical
- | | 05 Administrative, clerical or secretarial
- | | 06 Skilled trade
- | | 07 Caring, leisure, travel or personal services
- | | 08 Sales or customer service
- | | 09 Plant, process or machine drivers or operators
- | | 10 Other jobs
- | | 11 Something else
- | | 12 Casual jobs
- | | 13 Retired
- | | 14 Unemployed
- | | 15 Sick / disabled

| | END FILTER

| | **DITSET**



# **HEALTH MODULE (HE)**

**HEHELF** GENERAL HEALTH (VERY GOOD TO VERY BAD)

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

Would you say your health is...

INTERVIEWER: Read out...

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

**HEILL** WHETHER HAS LONG-STANDING ILLNESS

have any long-standing illness, disability or infirmity?

By long-standing I mean anything that has troubled over a period of time, or that is likely to affect over a period of time.

- 1 Yes
- 2 No

*IF whether has long-standing illness = Yes [Heill = 1]*

**HELIM** WHETHER HEALTH LIMITS ACTIVITIES

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

- 1 Yes
- 2 No

END FILTER

**HELWK** WHETHER HEALTH LIMITS PAID WORK

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

- 1 Yes
- 2 No

*IF whether health limits paid work = Yes [HeLWk = 1]*

**HETEMP** WHETHER EXPECTS HEALTH PROBLEM TO LAST LESS THAN 3 MONTHS

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

- 1 Yes
- 2 No

END FILTER

**HEFINT**

The next question asks about difficulties may have walking a quarter of a mile because of a health problem.

By health problem we mean any long-term physical, mental or emotional problem or illness.

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

**HEFUNC DIFFICULTY WITH WALKING A QUARTER OF A MILE**

By and without using any special equipment, how much difficulty have walking for a quarter of a mile?

have...

INTERVIEWER: Read out...

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

**HEEYE EYESIGHT CONDITION**

Is eyesight (using glasses or corrective lens if use them)...

INTERVIEWER: Read out...

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

**HEFRND EYESIGHT AT A DISTANCE**

How good is your eyesight for seeing things at a distance, like recognising a friend across the street  
(using glasses or corrective lens if use them)?

Would you say it is...

INTERVIEWER: Read out...

- 1 ...excellent,
- 2 very good,
- 3 good,

- 4 fair,
- 5 or, poor?

**HEPAP EYESIGHT UP CLOSE**

How good is your eyesight for seeing things up close, like reading ordinary newspaper print (using glasses or corrective lens if use them)?

Would you say it is...

INTERVIEWER: Read out...

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

*IF types of eye conditions = RESPONSE) AND NOT types of eye conditions = 96) [IFFW[PNum].HeOpt = RESPONSE AND NOT IFFW[PNum].HeOpt = 96]*

LOOP FOR idx:= 1 TO 4

**HEOPC WHETHER CONFIRMS PREVIOUS EYE CONDITION**

Our records show that when we last interviewed , said that had had (or had been told by a doctor had had) .

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

- 1 Yes
- 2 No

*IF whether confirms previous eye condition = No [HeOpC = 2]*

**HEOPN REASON EYE CONDITION DISPUTED**

INTERVIEWER: Code reason why respondent disputes the report.  
Respondent says...

- 1 Never had
- 2 No longer has
- 3 Did not have previously, but has now
- 4 Misdiagnosed

*IF (HeOpN = NoLong) OR (HeOpN = HasNow) [HeOpN = 2 OR HeOpN = 3]*

HEOPX WHETHER HAD EYE CONDITION AT THE TIME OF THE LAST INTERVIEW

INTERVIEWER: Did respondent have this condition at the time of the last interview?

If yes, go to HeOpc and code 1.

- 1 Yes
- 2 No

END FILTER

ELSE

*IF whether confirms previous eye condition = Yes [HeOpC = 1]*

HEOPS WHETHER STILL HAS EYE CONDITION

still have ?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

HEOPT TYPES OF EYE CONDITIONS

a doctor or optician told that (or had)...

INTERVIEWER: Read out each in turn and code all that apply.

Include Diabetic Retinopathy in code

2.

Include age related Maculopathy in code 3.

1

2

3

4

96 None of these

[code maximum 5 out of 5 possible responses]

| | IF ((HeOpC = Yes) OR (HeOpt = catarac)) OR ((HeOpN = NoLong) AND  
| | (HeOpX = No)) [HeOpC[4] = 1 OR HeOpt = 4 OR HeOpN[4] = 2 AND HeOpX[4] =  
| | 2]

| | **HECAT** EVER HAD CATARACT SURGERY

| | had cataract surgery?

- | | 1 Yes
- | | 2 No

| | END FILTER

| | **HEHEAR** HEARING CONDITION

| | Is hearing (using a hearing aid if use one)...

| | INTERVIEWER: Read out...

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

| | **HEHRA** WHETHER HAS DIFFICULTY FOLLOWING CONVERSATION

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

- | | 1 Yes
- | | 2 No

| | **HEDENT** WHETHER HAS NATURAL TEETH, DENTURES OR NEITHER  
| | SHOW CARD C1

| | In relation to dental health, which of the following applies to ?

- | | 1 no natural teeth and wear dentures
- | | 2 both natural teeth and denture(s)
- | | 3 only natural teeth
- | | 4 neither natural teeth nor dentures

| | **HEDNTA** DENTAL CONDITION

| | Would you say dental health (mouth, teeth and/or dentures) is ...READ OUT...

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

| | **HEDNTB** DIFFICULTIES CAUSED BY DENTAL CONDITION

SHOW CARD C2

In the past 6 months, have any problems with mouth, teeth or dentures caused to have any of the following?

CODE ALL THAT APPLY.

- 1 Difficulty eating food
  - 2 Difficulty speaking clearly
  - 3 Problems with smiling, laughing and showing teeth without embarrassment
  - 4 Problems with emotional stability, for example, becoming more easily upset than usual
  - 5 Problems enjoying the company of other people such as family, friends, or neighbours
  - 96 None of these
- [code maximum 5 out of 6 possible responses]

**HEBPCHK** WHETHER HAD BLOOD PRESSURE CHECKED IN PAST YEAR

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

- 1 Yes
- 2 No

*IF types of CVD conditions = RESPONSE) AND NOT types of CVD conditions = None) [IFFW[PNum].HeDiaa = RESPONSE AND NOT IFFW[PNum].HeDiaa = None]*

LOOP FOR Idx:= 1 TO 10

**HEDIAC** WHETHER CONFIRMS PREVIOUS CVD CONDITION

INTERVIEWER: Please check the following sentence before reading out loud.

.

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

- 1 Yes
- 2 No
- 3 Not read out as didn't make sense

*IF whether confirms previous CVD condition = No [HeDiaC = 2]*

**HEDIAN** REASON CVD CONDITION DISPUTED

INTERVIEWER: Code reason why respondent disputes having had .

Respondent says...

- 1 Never had
- 2 No longer has
- 3 Did not have previously, but has now
- 4 Misdiagnosed

*IF (HeDiaN = NoLong) OR (HeDiaN = HasNow) [HeDiaN = 2 OR HeDiaN = 3]*

**HEDIAX** WHETHER HAD CVD CONDITION AT LAST INTERVIEW

INTERVIEWER: Did respondent have this condition at the time of the last interview?

If yes, go to HeDiaC and code 1.

- 1 Yes
- 2 No

END FILTER

ELSE

*IF ((HeDiaC = Yes) OR (HeDiaX = Yes)) AND NOT (PSeq IN [3, 7, 8])  
[HeDiaC = 1 OR HeDiaX = 1 AND NOT PSeq = 3, 7, 8]*

**HEDIAS** WHETHER STILL HAS CVD CONDITION

still have ?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

END FILTER

**HEDIAA** TYPES OF CVD CONDITIONS

SHOW CARD C3

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

INTERVIEWER:PROBE - 'What others?'

Code all that apply.

- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08
- 09

95 Any other heart trouble (SPECIFY)

96 None of these

[code maximum 10 out of 11 possible responses]

*IF (EditQre = Yes) AND (HeDiaa = CVDOth) [EditQre = 1 AND HeDiaa = 95]*

#### **HEDIAZ TYPES OF CVD CONDITIONS**

EDITOR : Back code here - CODE FRAME 2

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

Code all that apply.

- 01 High blood pressure or hypertension
- 02 Angina
- 03 A heart attack (including myocardial infarction or coronary thrombosis)
- 04 Congestive heart failure
- 05 A heart murmur
- 06 An abnormal heart rhythm
- 07 Diabetes or high blood sugar
- 08 A stroke (cerebral vascular disease)
- 09 High cholesterol
- 85 Other answer - not codeable 01-08
- 86 Irrelevant response - not codeable 01-08
- 95 Any other heart trouble (SPECIFY)
- 96 None of these

[code maximum 13 out of 13 possible responses]

END FILTER

*IF (HeDiaa = CVDOth) AND ((EditQre <> Yes) OR (HeDiaZ = EMPTY OR  
/ / (HeDiaZ = Other))) [HeDiaa = 95 AND EditQre <> 1 OR HeDiaZ = EMPTY OR  
/ / HeDiaZ = 95]*

#### **HEDIX OTHER HEART CONDITION**

INTERVIEWER: Enter name of other heart condition.

String: 30

END FILTER

| | *IF (HeDiaa = CVD1) OR types of CVD conditions = CVD1) AND*  
| | *(QHeDiaa.HeDiaN <> Never)) AND (QHeDiaa.HeDiaN <> MisDiag)) [HeDiaa = 1*  
| | *OR IFFW[PNum].HeDiaa = 1 AND QHeDiaa.HeDiaN <> 1 AND*  
| | *QHeDiaa.HeDiaN <> 4]*

| | **HEHIBPB** WHETHER RECOMMENDED MEDICATION TO LOWER BP

| | Some doctors suggest that some patients take medication to lower their blood pressure.

| | Did a doctor or nurse ever suggest that you take any medication to lower your blood pressure?

- | | 1 Yes
- | | 2 No

| | END FILTER

| | *IF (HeDiaa = CVD1) OR (QHeDiaa.HeDiaS = Yes) [HeDiaa = 1 OR*  
| | *QHeDiaa.HeDiaS = 1]*

| | **HEMDA** WHETHER CURRENTLY TAKING MEDICATION FOR HIGH BP

| | currently taking any medication, tablets or pills for high blood pressure?

- | | 1 Yes
- | | 2 No

| | END FILTER

| | **HEMDAB** WHETHER CURRENTLY TAKING MEDICATION PREVENTING HIGH  
BP

| | Can I just check, are you taking medication which prevents you from getting high blood pressure any more?

- | | 1 Yes
- | | 2 No

| | *IF types of CVD conditions <> RESPONSE) AND (HeDiaa = CVD2) [IFFW*  
| | *[PNum].HeDiaa <> RESPONSE AND HeDiaa = 2]*

| | **HEAGA** AGE FIRST TOLD HAD ANGINA

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

| | INTERVIEWER: Enter age in years.  
| | Range: 0..110

| | ELSE

| | **HEAGAR** MONTH TOLD HAD ANGINA

When were you told by a doctor that you had angina?

INTERVIEWER: Enter response in month and year.

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

**HEAGARY YEAR TOLD HAD ANGINA**

INTERVIEWER: Enter the year at this question.  
Range: 1900..2200

END FILTER

**HEYRA WHETHER HAD ANGINA OR CHEST PAINS**

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

- 1 Yes
- 2 No

*IF types of CVD conditions <> RESPONSE) AND (HeDiaa = CVD3) [IFFW  
/ [PNum].HeDiaa <> RESPONSE AND HeDiaa = 3]*

**HEAGB AGE FIRST TOLD HAD HEART ATTACK**

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

INTERVIEWER: Enter age in years.  
Range: 0..110

END FILTER

*IF ((HeDiaa = CVD3) AND types of CVD conditions = RESPONSE)) AND  
/ NOT types of CVD conditions = CVD3) [HeDiaa = 3 AND IFFW[PNum].HeDiaa =  
/ RESPONSE AND NOT IFFW[PNum].HeDiaa = 3]*

**HEAGBR MONTH TOLD HAD HEART ATTACK**

When told by a doctor that had a heart attack?

INTERVIEWER: Enter response in month and year.

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

**HEAGBRY YEAR TOLD HAD HEART ATTACK**

INTERVIEWER: Enter the year at this question.  
Range: 1900..2200

END FILTER

*IF (HeDiaa = CVD3) OR (((QHeDiaa.HeDiaC = Yes) AND (QHeDiaa.HeDiaN <> Never)) AND (QHeDiaa.HeDiaN <> MisDiag)) [HeDiaa = 3 OR QHeDiaa.HeDiaC = 1 AND QHeDiaa.HeDiaN <> 1 AND QHeDiaa.HeDiaN <> 4]*

**HENMMI NUMBER OF HEART ATTACKS IN THE LAST TWO YEARS**

How many heart attacks (including myocardial infarction or coronary thrombosis), if any, had in the last 2 years according to a doctor?

- 0 None
- 1 1
- 2 2
- 3 3 or more

END FILTER

*IF types of CVD conditions <> RESPONSE) AND (HeDiaa = CVD4) [IFFW [PNum].HeDiaa <> RESPONSE AND HeDiaa = 4]*

**HEAGC AGE FIRST TOLD HAD CONGESTIVE HEART FAILURE**

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

INTERVIEWER: Enter age in years.

Range: 0..110

ELSE

*IF (HeDiaa = CVD4) AND types of CVD conditions = RESPONSE)) AND  
NOT types of CVD conditions = CVD4) [HeDiaa = 4 AND IFFW[PNum].HeDiaa  
= RESPONSE AND NOT IFFW[PNum].HeDiaa = 4]*

**HEAGCR MONTH TOLD HAD CONGESTIVE HEART FAILURE**

When told by a doctor that had congestive heart failure?

INTERVIEWER: Enter response in month and year.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

**HEAGCRY YEAR TOLD HAD CONGESTIVE HEART FAILURE**

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

END FILTER

END FILTER

*IF types of CVD conditions <> RESPONSE) AND (HeDiaa = CVD7) [IFFW  
[PNum].HeDiaa <> RESPONSE AND HeDiaa = 7]*

**HEAGD AGE FIRST TOLD HAD DIABETES**

May I check, how old when first told by a doctor that had diabetes or high  
blood sugar?

INTERVIEWER: Enter age in years.

Range: 0..110

ELSE

| | | *IF ((HeDiaa = CVD7) AND types of CVD conditions = RESPONSE)) AND*  
| | | *NOT types of CVD conditions = CVD7) [HeDiaa = 7 AND IFFW[PNum].HeDiaa*  
| | | *= RESPONSE AND NOT IFFW[PNum].HeDiaa = 7]*

| | | **HEAGDR MONTH TOLD HAD DIABETES**

| | | When told by a doctor that had diabetes or high blood sugar?

| | | INTERVIEWER: Enter response in month and year.

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

| | | **HEAGDRY YEAR TOLD HAD DIABETES**

| | | INTERVIEWER: Enter the year at this question.

| | | Range: 1900..2050

| | | END FILTER

| | | END FILTER

| | | *IF whether ever told had diabetes = No) OR whether ever told had diabetes =*  
| | | *DONTKNOW)) OR ((QHeDiaa.HeDiaC = Yes) AND whether ever told had*  
| | | *diabetes <> RESPONSE))) OR (HeDiaa = CVD7) [IFFW[PNum].HeACd = No OR*  
| | | *IFFW[PNum].HeACd = DONTKNOW OR QHeDiaa.HeDiaC = 1 AND IFFW*  
| | | *[PNum].HeACd <> RESPONSE OR HeDiaa = 7]*

| | | **HEACD WHETHER EVER TOLD HAD DIABETES**

| | | INTERVIEWER: ASK OR CODE: Has a doctor ever told that diabetes?

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | | *IF whether ever told had diabetes = Yes) OR (HeACd = Yes) [IFFW*  
| | | *[PNum].HeACd = Yes OR HeACd = 1]*

| | | **HEINS WHETHER CURRENTLY INJECTS INSULIN**

currently inject insulin for diabetes?

- 1 Yes
- 2 No

**HEMDB** WHETHER IS CURRENTLY TAKING MEDICATION FOR DIABETES

currently taking any tablets, pills or other medication that swallow for diabetes?

- 1 Yes
- 2 No

**HEACE** WHETHER ADVISED TO TAKE ACE INHIBITOR/A2 RECEPTOR BLOCKER

Has a doctor discussed with whether should take a medication called an ACE inhibitor or A2 receptor blocker?

INTERVIEWER: PROBE - 'These drugs are also called angiotensin converting enzyme inhibitors or

angiotensin-II receptor blockers. Examples are captopril, enalapril, lisinopril, losartan, and

valsartan.'

- 1 Yes
- 2 No

**HEACEA** WHETHER TAKING ACE INHIBITOR/A2 RECEPTOR BLOCKER IN PAST WEEK

SHOW CARD C4

I would like to check whether any of the medications taking are on this list of ACE inhibitors or A2 receptor blockers. Could you show me the medications, or the repeat prescription list for any medications, that have been taking over the past week?

INTERVIEWER: Please check the names of all medications to see if they are included in the list of

ACE inhibitors or A2 receptor blockers. Press 1 if you identify one of the respondent's medications

as being on the list of ACE inhibitors or A2 receptor blockers, otherwise press 2.

PROBE: Can I

just check that these are/this is a medication that been taking over the past week?

- 1 Taking ACE inhibitor or A2 receptor blocker
- 2 Not taking ACE inhibitor or A2 receptor blocker
- 3 Taking other ACE inhibitor not on the showcard

**HEWEE** WHETHER HAD URINE TEST IN PAST 12 MONTHS

Some doctors check to see if patients with diabetes have protein in their urine.  
had a urine test for protein in the past 12 months?

INTERVIEWER: PROBE - 'This test may also be called a microalbumin test, and  
involves a first

morning urine sample or 24-hour urine collection.'

- 1 Yes
- 2 No

*IF whether had urine test in past 12 months = Yes [Hewee = 1]*

**HEWEEA** WHETHER EVER HAD PROTEIN IN URINE

Has a doctor ever told you that you have protein in your urine?

- 1 Yes
- 2 No

END FILTER

ELSE

*IF whether taking ACE inhibitor/A2 receptor blocker in past week =  
OthAce [HeAcea = 3]*

**HEDIXB** OTHER ACE INHIBITOR/A2 RECEPTOR BLOCKER BEEN TAKING  
IN PAST WEEK

INTERVIEWER: Enter name of other ACE inhibitor.

String: 30

END FILTER

**HEKIDN** WHETHER EVER HAD TROUBLE WITH KIDNEYS

Has a doctor ever told you that you that your diabetes has caused trouble with  
your kidneys?

- 1 Yes
- 2 No

**HESUG** WHETHER EVER HAD BLOOD SUGAR TEST

Have you ever had a special blood test to see how well your blood sugar was  
controlled? This test is called a glycosylated haemoglobin, or haemoglobin  
A1c, or fructosamine. This is a blood test taken at a doctor's surgery or health  
centre or laboratory.

- 1 Yes
- 2 No

*IF whether ever had blood sugar test = Yes [Hesug = 1]*

**HESUGA** WHETHER HAD BLOOD SUGAR TEST IN PAST YEAR

Have you had this test (glycosylated haemoglobin or fructosamine) performed in the past 12 months?

- 1 Yes
- 2 No

END FILTER

**HEFTCHK** WHETHER HAD FOOT EXAMINATION IN PAST YEAR

Some doctors suggest that some patients with diabetes have a regular foot examination. In the past year, has any doctor or nurse examined your bare feet?

- 1 Yes
- 2 No

**HESLFCR** WHETHER EVER HAD DIABETES MANAGEMENT TRAINING

Some people with diabetes receive training to help manage their diabetes themselves. Have you ever participated in a course or class about diabetes, or received special training on how you can live with your diabetes from day-to-day?

INTERVIEWER: Press F9 for examples of training.

- 1 Yes
- 2 No

*IF whether ever had diabetes management training = Yes [Heslfcrcr = 1]*

**HESLFCM** MONTH HAD DIABETES MANAGEMENT TRAINING

When was the most recent time that you participated in a diabetes self-management course or class or received special training on how you can manage your diabetes?

INTERVIEWER: Enter the month here.

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

11 November

12 December

*IF month had diabetes management training = RESPONSE [Heslfc =  
RESPONSE]*

**HESLFCY YEAR HAD DIABETES MANAGEMENT TRAINING**

(When was the most recent time that you participated in a diabetes self-management course or class or received special training on how you can manage your diabetes?)

INTERVIEWER: Enter the year here.

Range: 0..9997

END FILTER

END FILTER

**HESLFCB HOW MUCH KNOWS ABOUT DIABETES MANAGEMENT**

SHOW CARD C5

How much do you think you know about managing your diabetes? Do you know...

INTERVIEWER: Read out...

- 1 ...just about everything you need to know,
- 2 most of what you need to know,
- 3 some of what you need to know,
- 4 a little of what you need to know,
- 5 or almost none of what you need to know?

END FILTER

*IF types of CVD conditions <> RESPONSE) AND (HeDiaa = CVD8) [IFFW  
[PNum].HeDiaa <> RESPONSE AND HeDiaa = 8]*

**HEAGE AGE FIRST TOLD HAD A STROKE**

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

INTERVIEWER: Enter age in years.

Range: 0..110

END FILTER

| | | IF ((HeDiaa = CVD8) AND types of CVD conditions = RESPONSE) AND  
| | | NOT types of CVD conditions = CVD8) [HeDiaa = 8 AND IFFW[PNum].HeDiaa  
| | | = RESPONSE AND NOT IFFW[PNum].HeDiaa = 8]

| | | **HEAGER MONTH TOLD HAD A STROKE**

| | | When told by a doctor that had a stroke?

| | | INTERVIEWER: Enter response in month and year

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

| | | **HEAGERY YEAR TOLD HAD A STROKE**

| | | INTERVIEWER: Enter the year at this question.

| | | Range: 1900..2050

| | | END FILTER

| | | IF (HeDiaa = CVD8) OR (((QHeDiaa.HeDiaC = Yes) AND  
| | | (QHeDiaa.HeDiaN <> Never)) AND (QHeDiaa.HeDiaN <> MisDiag)) [HeDiaa =  
| | | 8 OR QHeDiaa.HeDiaC = 1 AND QHeDiaa.HeDiaN <> 1 AND  
| | | QHeDiaa.HeDiaN <> 4]

| | | **HENMST NUMBER OF STROKES IN THE LAST TWO YEARS**

| | | How many strokes, if any, had in the last 2 years according to a doctor?

- | | | 0 None
- | | | 1 1
- | | | 2 2
- | | | 3 3 or more

| | | END FILTER

| | | IF (HeDiaa = CVD8) OR types of CVD conditions = CVD8) AND  
| | | (QHeDiaa.HeDiaN <> Never)) AND (QHeDiaa.HeDiaN <> MisDiag)) [HeDiaa =  
| | | 8 OR IFFW[PNum].HeDiaa = 8 AND QHeDiaa.HeDiaN <> 1 AND  
| | | QHeDiaa.HeDiaN <> 4]

```

| | | | HEHIBPB1 WHETHER RECOMMENDED MEDICATION TO LOWER BP
| | | |
| | | | Some doctors suggest that some patients take medication to lower their blood
| | | | pressure.
| | | |
| | | | Did a doctor or nurse ever suggest that you take any medication to lower your
| | | | blood pressure?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | HEPBS WHETHER ANY REMAINING PROBLEMS BECAUSE OF STROKE
| | | |
| | | | have any remaining problems because of stroke(s)?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | IF whether any remaining problems because of stroke = Yes [HePBS = 1]
| | | |
| | | | HEWKS WHETHER HAS WEAKNESS IN/LESS ABLE TO MOVE ARMS AND
LEGS
| | | |
| | | | have weakness in arms and legs, or decreased ability to move or use
| | | | them?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | HESPK WHETHER HAS DIFFICULTY SPEAKING/SWALLOWING
| | | |
| | | | ( have) any difficulty speaking or swallowing?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | HEVSI WHETHER HAS DIFFICULTY WITH VISION
| | | |
| | | | ( have) any difficulty with vision?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | HETHK WHETHER HAS DIFFICULTY FINDING RIGHT WORDS
| | | |
| | | | ( have) any difficulty in thinking or finding the right words to say?
| | | | 1 Yes
| | | | 2 No
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF (((HeDiaa = CVD2) OR (HeDiaa = CVD3)) OR types of CVD conditions =
| | | | CVD2) AND (QHeDiaa.HeDiaN <> Never) AND (QHeDiaa.HeDiaN <>

```

```
| | | MisDiag))) OR types of CVD conditions = CVD3) AND (QHeDiaa.HeDiaN <>
| | | Never)) [HeDiaa = 2 OR HeDiaa = 3 OR IFFW[PNum].HeDiaa = 2 AND
| | | QHeDiaa.HeDiaN <> 1 AND QHeDiaa.HeDiaN <> 4 OR IFFW[PNum].HeDiaa
| | | = CVD3 AND QHeDiaa.HeDiaN <> 1]
```

**HEHRTMD** WHETHER TAKING BLOOD THINNING MEDICATION

currently taking any medication to thin the blood such as Warfarin, Plavix,  
Ticlid, or other blood-thinning medication?

- 1 Yes
- 2 No

END FILTER

```
| | | IF (HeDiaa = CVD9) OR (QHeDiaa.HeDiaS = Yes) [HeDiaa = 9 OR
| | | QHeDiaa.HeDiaS = 1]
```

**HECHMD**

currently taking any medication to lower cholesterol level?

- 1 Yes
- 2 No

END FILTER

```
| | | IF (((QHeDiaa.HeDiaN = NoLong) AND (QHeDiaa.HeDiaX = No)) OR
| | | (QHeDiaa.HeDiaS = No)) AND @/^AreIs[pnum] ^youname[pnum] = EMPTY
| | | [QHeDiaa.HeDiaN = 2 AND QHeDiaa.HeDiaX = 2 OR QHeDiaa.HeDiaS = 2
| | | AND HeChMd = EMPTY]
```

**HECHME**

Can I just check, taking medication which prevents you from getting high  
cholesterol any more?

- 1 Yes
- 2 No

END FILTER

```
| | | IF SHOW CARD C6 @/^Has a doctor^e = RESPONSE) AND NOT SHOW
| | | CARD C6 @/^Has a doctor^e = None) [IFFW[PNum].HeDiab = RESPONSE
| | | AND NOT IFFW[PNum].HeDiab = None]
```

LOOP FOR Idx:= 1 TO 9

**HEDIAD**

INTERVIEWER: Please check the following sentence before reading out

loud.


| | | | | INTERVIEWER: Code 1 below unless respondent spontaneously disputes  
this

| | | | | record.

- | | | | | 1 Yes
- | | | | | 2 No
- | | | | | 3 Not read out as didn't make sense

| | | | | *IF @/INTERVIEWER: Please check th = No [HeDiaD = 2]*

| | | | | **HEDIAM**

| | | | | INTERVIEWER: Code reason why respondent disputes having had .  
Respondent says...

- | | | | | 1 Never diagnosed
- | | | | | 2 No longer has
- | | | | | 3 Did not have previously, but has now
- | | | | | 4 Misdiagnosed

| | | | | *IF (HeDiaM = NoLong) OR (HeDiaM = HasNow) [HeDiaM = 2 OR  
| | | | | HeDiaM = 3]*

| | | | | **HEDIAMX**

| | | | | INTERVIEWER: Did respondent have this condition at the time of the last  
interview?

| | | | | If yes, go to HeDiaD and code 1 (Yes).

- | | | | | 1 Yes
- | | | | | 2 No

| | | | | END FILTER

| | | | | ELSE

| | | | | *IF NOT (PSeq IN [7 .. 8]) AND ((HeDiaD = Yes) OR (HeDiaMX =  
| | | | | Yes)) [NOT PSeq = 7 , 8 AND HeDiaD = 1 OR HeDiaMX = 1]*

| | | | | **HEDIDS**

| | | | | still have ?

- | | | | | 1 Yes
- | | | | | 2 No

| | | | |

END FILTER

END FILTER

END FILTER

END FILTER

**HEDIAB**

SHOW CARD C6

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

INTERVIEWER:PROBE - 'What others?'...Code all that apply.

01

02

03

04

05

06

07 Any emotional, nervous or psychiatric problems

08

09

10 Malignant blood disorder, e.g. leukaemia

96 None of these

[code maximum 10 out of 11 possible responses]

*IF SHOW CARD C6 @/^Has a doctor^e = ChrLung) AND  
/ / / (QHeDiab.HeDiDS = Yes)) OR (HeDiab = ChrLung) [IFFW[PNum].HeDiab =  
/ / / ChrLung AND QHeDiab.HeDiDS = 1 OR HeDiab = 1]*

**HELNG**

taking medication or other treatment for lung condition?

1 Yes

2 No

END FILTER

*IF ((QHeDiab.HeDiaM = NoLong) AND (QHeDiab.HeDiaMX = No)) OR  
/ / / (QHeDiab.HeDiDS = No) [QHeDiab.HeDiaM = 2 AND QHeDiab.HeDiaMX = 2  
/ / / OR QHeDiab.HeDiDS = 2]*

**HELNGB**

Can I just check, taking medication which prevents from getting chronic  
lung disease, such as chronic bronchitis or emphysema, any more?

1 Yes

2 No

END FILTER

*IF SHOW CARD C6 @/^Has a doctor^e = Asthma) AND  
/ / / (QHeDiab.HeDiDS = Yes)) OR (HeDiab = Asthma) [IFFW[PNum].HeDiab =  
/ / / Asthma AND QHeDiab.HeDiDS = 1 OR HeDiab = 2]*

**HEAMA**

taking medication or other treatment for asthma?

- 1 Yes
- 2 No

END FILTER

*IF ((QHeDiab.HeDiaM = NoLong) AND (QHeDiab.HeDiaMX = No)) OR  
/ / / (QHeDiab.HeDiDS = No) [QHeDiab.HeDiaM = 2 AND QHeDiab.HeDiaMX = 2  
/ / / OR QHeDiab.HeDiDS = 2]*

**HEAMB**

Can I just check, taking medication which prevents from getting asthma any more?

- 1 Yes
- 2 No

END FILTER

*IF ((QHeDiab.HeDiaD = Yes) OR (((QHeDiab.HeDiaD = No) AND  
/ / / (QHeDiab.HeDiaM <> Never)) AND (QHeDiab.HeDiaM <> MisDiag))) OR  
/ / / ((Arthrit IN HeDiab) AND ((QHeDiab.HeDiDS <> No) AND NOT  
/ / / (QHeDiab.HeDiaM IN [Never, NoLong, MisDiag]))) [QHeDiab.HeDiaD = 1 OR  
/ / / QHeDiab.HeDiaD = 2 AND QHeDiab.HeDiaM <> 1 AND QHeDiab.HeDiaM <>  
/ / / 4 OR Arthrit = HeDiab AND QHeDiab.HeDiDS <> 2 AND NOT  
/ / / QHeDiab.HeDiaM = 1, 2, 4]*

**HEART**

May I check, which type or types of arthritis have...

INTERVIEWER: Read out each in turn and code all that apply.

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

[code maximum 3 out of 3 possible responses]

*IF SHOW CARD C6 @/^Has a doctor^e <> RESPONSE) AND (HeDiab =  
/ / / Arthrit) [IFFW[PNum].HeDiab <> RESPONSE AND HeDiab = 3]*

**HEAGF**

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

INTERVIEWER: Enter age in years.  
Range: 0..110

ELSE

*IF ((HeDiab = Arthrit) AND SHOW CARD C6 @/^Has a doctor^e =  
RESPONSE)) AND NOT SHOW CARD C6 @/^Has a doctor^e = Arthrit)  
[HeDiab = 3 AND IFFW[PNum].HeDiab = RESPONSE AND NOT IFFW  
[PNum].HeDiab = 3]*

**HEAGFR**

When told by a doctor that had arthritis?

INTERVIEWER: Enter response in month and year.

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

**HEAGFRY**

INTERVIEWER: Enter the year at this question.  
Range: 1900..2050

END FILTER

END FILTER

END FILTER

**HEARTA**

Has any doctor or nurse ever talked to you about... What your arthritis or joint pain will be like as time goes on?

- 1 Yes
- 2 No

**HEARTB**

(Has any doctor or nurse ever talked to you about...) How to keep your arthritis or joint pain from getting worse?

- 1 Yes
- 2 No

**HEARTC**

(Has any doctor or nurse ever talked to you about...) How your arthritis or joint pain will be treated?

- 1 Yes
- 2 No

*IF @/(Has any doctor or nurse eve = Yes [HeArtc = 1]*

**HEARTD**

(Has any doctor or nurse ever talked to you about...) what the specific purpose of the treatment for your arthritis or joint pain is?

- 1 Yes
- 2 No

END FILTER

*IF @/(Has any doctor or nurse eve = Yes [HeArtc = 1]*

**HEARTE**

Some doctors suggest trying paracetamol as the first medication for arthritis or joint pain. Did any doctor or nurse recommend you try paracetamol before other medicines for your joint pain?

- 1 Yes
- 2 No

END FILTER

*IF ((QHeDiab.HeDiaD = Yes) OR (((QHeDiab.HeDiaD = No) AND  
| | | (QHeDiab.HeDiaM <> Never)) AND (QHeDiab.HeDiaM <> MisDiag))) OR  
| | | ((Arthrit IN HeDiab) AND ((QHeDiab.HeDiDS <> No) AND NOT  
| | | (QHeDiab.HeDiaM IN [Never, NoLong, MisDiag]))) [QHeDiab.HeDiaD = 1 OR  
| | | QHeDiab.HeDiaD = 2 AND QHeDiab.HeDiaM <> 1 AND QHeDiab.HeDiaM <>  
| | | 4 OR Arthrit = HeDiab AND QHeDiab.HeDiDS <> 2 AND NOT  
| | | QHeDiab.HeDiaM = 1, 2, 4]*

**HELEUK**

have one of the following blood disorders...

INTERVIEWER: Read out...  
1 ...leukaemia,  
2 ...lymphoma,  
3 or some other blood disorder?

END FILTER

*IF SHOW CARD C6 @/^Has a doctor^e <> RESPONSE) AND (HeDiab = Cancer) [IFFW[PNum].HeDiab <> RESPONSE AND HeDiab = 5]*

**HEAGG**

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

INTERVIEWER: Enter age in years.  
Range: 0..110

ELSE

*IF SHOW CARD C6 @/^Has a doctor^e = RESPONSE) AND NOT SHOW CARD C6 @/^Has a doctor^e = Cancer)) AND (HeDiab = Cancer) [IFFW [PNum].HeDiab = RESPONSE AND NOT IFFW[PNum].HeDiab = Cancer AND HeDiab = 5]*

**HEAGGR**

When told by a doctor that had cancer or a malignant tumor?

INTERVIEWER: Enter response in month and year. Enter month here.

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

**HEAGGRY**

INTERVIEWER: Enter the year at this question.  
Range: 1900..2050

END FILTER

END FILTER

*IF (HeLeuk IN [Leukaemia, Lymphoma]) AND SHOW CARD C6 @/^Has a doctor^e <> RESPONSE) [HeLeuk = 1, 2 AND IFFW[PNum].HeDiab <> RESPONSE]*

**HEAGK**

Approximately how old when first told by a doctor that had leukaemia or lymphoma?

INTERVIEWER: Enter age in years.

Range: 0..110

END FILTER

*IF SHOW CARD C6 @/^Has a doctor^e = RESPONSE) AND (HeLeuk IN [Leukaemia, Lymphoma]) [IFFW[PNum].HeDiab = RESPONSE AND HeLeuk = 1, 2]*

**HEAGKR**

When in the last two years first told by a doctor that had leukaemia or lymphoma?

INTERVIEWER: Enter response in month and year. Enter month here.

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

**HEAGKRY**

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

END FILTER

*IF SHOW CARD C6 @/^Has a doctor^e = RESPONSE) AND (HeLeuk IN [Leukaemia, Lymphoma]) [IFFW[PNum].HeDiab = RESPONSE AND HeLeuk =*

| | | 1, 2]

| | | **HECANAA**

| | | SHOW CARD C7

| | | In which part of body did the cancer/cancers/malignant tumours start?

| | | INTERVIEWER: Code one only.

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

| | | END FILTER

| | | *IF (HeDiab = Cancer) OR ((QHeDiab.HeDiaD = Yes) AND*  
| | | *(QHeDiab.HeDiaM <> NoLong)) [HeDiab = 5 OR QHeDiab.HeDiaD = 1 AND*  
| | | *QHeDiab.HeDiaM <> 2]*

| | | **HECANB**

| | | received any treatment for cancer?

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | | *IF @/^DoDoes[pnum] ^youname[pnum] IN [Leukaemia, Lymphoma]*  
| | | *[HeLeuk = 1, 2]*

| | | **HECANBB**

| | | received any treatment for leukaemia or lymphoma?

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | | *IF SHOW CARD C6 @/^Has a doctor^e <> RESPONSE) AND (HeDiab =*  
| | | *Parkin) [IFFW[PNum].HeDiab <> RESPONSE AND HeDiab = 6]*

| | | **HEPRK**

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

```

| | | INTERVIEWER: Enter age in years.
| | | Range: 0..110
| | |
| | | ELSE
| | |
| | | IF ((HeDiab = Parkin) AND SHOW CARD C6 @/^Has a doctor^e =
| | | RESPONSE)) AND NOT SHOW CARD C6 @/^Has a doctor^e = Parkin)
| | | [HeDiab = 6 AND IFFW[PNum].HeDiab = RESPONSE AND NOT IFFW
| | | [PNum].HeDiab = 6]
| | |
| | | HEPRKR
| | | When told by a doctor that had Parkinson's disease?
| | |
| | | INTERVIEWER: Enter response in month and year.
| | | 01 January
| | | 02 February
| | | 03 March
| | | 04 April
| | | 05 May
| | | 06 June
| | | 07 July
| | | 08 August
| | | 09 September
| | | 10 October
| | | 11 November
| | | 12 December
| | |
| | | HEPRKRY
| | |
| | | INTERVIEWER: Enter the year at this question.
| | | Range: 1900..2050
| | |
| | | END FILTER
| | |
| | | END FILTER
| | |
| | | IF SHOW CARD C6 @/^Has a doctor^e <> RESPONSE) AND (HeDiab =
| | | Psych) [IFFW[PNum].HeDiab <> RESPONSE AND HeDiab = 7]
| | |
| | | HEAGH
| | |
| | | Approximately how old when first told by a doctor that had emotional,
| | | nervous or psychiatric problems?
| | |
| | | INTERVIEWER: Enter age in years.
| | | Range: 0..110

```

END FILTER

*IF ((HeDiab = Psych) AND SHOW CARD C6 @/^Has a doctor^e =  
RESPONSE)) AND NOT SHOW CARD C6 @/^Has a doctor^e = Psych)  
[HeDiab = 7 AND IFFW[PNum].HeDiab = RESPONSE AND NOT IFFW  
[PNum].HeDiab = 7]*

**HEAGHR**

When told by a doctor that had emotional, nervous or psychiatric problems?

INTERVIEWER: Enter response in month and year.

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

**HEAGHRY**

INTERVIEWER: Enter the year at this question.

Range: 1900..2050

END FILTER

*IF (HeDiab = Psych) OR SHOW CARD C6 @/^Has a doctor^e = Psych)  
AND (QHeDiab.HeDiaM <> Never)) AND (QHeDiab.HeDiaM <> MisDiag))  
[HeDiab = 7 OR IFFW[PNum].HeDiab = 7 AND QHeDiab.HeDiaM <> 1 AND  
QHeDiab.HeDiaM <> 4]*

**HEPSY**

SHOW CARD C8

What type of emotional, nervous or psychiatric problems (/did) have?

INTERVIEWER:PROBE - 'What others?'

Code all that apply.

Include panic attacks under

'Anxiety'

- 1 Hallucinations
  - 2 Anxiety
  - 3 Depression
  - 4 Emotional problems
  - 5 Schizophrenia
  - 6 Psychosis
  - 7 Mood swings
  - 8 Manic depression
  - 95 Something else
- [code maximum 9 out of 9 possible responses]

**HEYRC**

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

- 1 Yes
- 2 No

END FILTER

*IF SHOW CARD C6 @/^Has a doctor^e <> RESPONSE) AND (HeDiab = Alzheimer) [IFFW[PNum].HeDiab <> RESPONSE AND HeDiab = 8]*

**HEAGI**

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

INTERVIEWER: Enter age in years.  
Range: 0..110

ELSE

*IF ((HeDiab = Alzheimer) AND SHOW CARD C6 @/^Has a doctor^e = RESPONSE)) AND NOT SHOW CARD C6 @/^Has a doctor^e = Alzheimer) [HeDiab = 8 AND IFFW[PNum].HeDiab = RESPONSE AND NOT IFFW [PNum].HeDiab = 8]*

**HEAGIR**

When told by a doctor that had Alzheimer's Disease?

INTERVIEWER: Enter response in month and year.

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

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

**HEAGIRY**

INTERVIEWER: Enter the year at this question.  
Range: 1900..2050

END FILTER

END FILTER

*IF SHOW CARD C6 @/^Has a doctor^e <> RESPONSE) AND (HeDiab =  
CogImp) [IFFW[PNum].HeDiab <> RESPONSE AND HeDiab = 9]*

**HEAGJ**

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

INTERVIEWER: Enter age in years.  
Range: 0..110

ELSE

*IF ((HeDiab = CogImp) AND SHOW CARD C6 @/^Has a doctor^e =  
RESPONSE)) AND NOT SHOW CARD C6 @/^Has a doctor^e = CogImp)  
[HeDiab = 9 AND IFFW[PNum].HeDiab = RESPONSE AND NOT IFFW  
[PNum].HeDiab = 9]*

**HEAGJR**

When told by a doctor that had dementia, senility or any other serious  
memory impairment?

INTERVIEWER: Enter the response as month and year.  
Enter the month at this question.

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August

- 09 September
- 10 October
- 11 November
- 12 December

**HEAGJRY**

INTERVIEWER: Enter the year at this question.  
Range: 1900..2050

END FILTER

END FILTER

**HEFLA**

you fallen down (for any reason)?

- 1 Yes
- 2 No

*IF @/^Have you fallen down ^last2 = Yes [HeFla = 1]*

**HEFLB**

How many times have you fallen down ?

Range: 0..400

**HEFLC**

In , did you injure yourself seriously enough to need medical treatment?

- 1 Yes
- 2 No

END FILTER

*IF QInd.IAgeOf >= 60 [IAgeOf >= 60]*

**HEFRAC**

fractured hip?

- 1 Yes
- 2 No

END FILTER

*IF QInd.IAgeOf >= 60 [IAgeOf >= 60]*

**HEJI**

had any joint replacements/resurfacing?

- 1 Yes
- 2 No

IF @^CHaveHas[PNum] ^youname[PNU = Yes [HeJi = 1]

**HEJIAA**

Which joints did have replaced/resurfaced?

INTERVIEWER:PROBE - 'What others?'

Code all that apply.

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

[code maximum 4 out of 5 possible responses]

**HEJIBRH**

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

INTERVIEWER: Enter the main reason.

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

END FILTER

**HEJIBLH**

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

INTERVIEWER: Enter the main reason.

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

END FILTER

**HEJIBRK**

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

INTERVIEWER: Enter the main reason.

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

END FILTER

**HEJIBLK**

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

INTERVIEWER: Enter the main reason.

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

END FILTER

END FILTER

END FILTER

**HEIQA**

SHOW CARD C9

Now we want you to remember what was like two years ago and to compare it with what is like now. Two years ago was in . I will read out situations where has to use memory or intelligence and we want you to indicate whether this has improved, stayed the same or got worse in that situation over the past two years. Note the importance of comparing present performance with two years ago. So if two years ago always forgot where had left things, and still does, then this would be considered 'Hasn't changed much'. Please indicate the changes you have observed giving the appropriate answer from the card.

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

IF @/SHOW CARD C9 @/@/Now we want = Continue [Heiqa = 1]

**HEIQB**

SHOW CARD C9

Compared with two years ago, how is at remembering things about family and friends, like occupations, birthdays or addresses?

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

**HEIQC**

SHOW CARD C9

Compared with two years ago, how is at remembering things that have happened recently?

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

**HEIQD**

SHOW CARD C9

Compared with two years ago, how is at recalling conversations a few days later?

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

**HEIQE**

SHOW CARD C9

Compared with two years ago, how is at remembering address and telephone number?

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

**HEIQF**

SHOW CARD C9

Compared with two years ago, how is at remembering what day and month it is?

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

**HEIQG**

SHOW CARD C9

Compared with two years ago, how is at remembering where things are usually kept?

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

**HEIQH**

SHOW CARD C9

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

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

**HEIQI**

SHOW CARD C9

Compared with two years ago, how is at knowing how to work familiar machines around the house?

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

**HEIQJ**

SHOW CARD C9

Compared with two years ago, how is at learning to use a new gadget or machine around the house?

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

**HEIQK**

SHOW CARD C9

Compared with two years ago, how is at learning new things in general?

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

**HEIQL**

SHOW CARD C9

Compared with two years ago, how is at following a story in a book or on TV?

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

**HEIQM**

SHOW CARD C9

Compared with two years ago, how is at making decisions on everyday matters?

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

**HEIQN**

SHOW CARD C9

Compared with two years ago, how is at handling money for shopping?

- 1 Much improved
- 2 A bit improved

- 3 Not much change
- 4 A bit worse
- 5 Much worse

**HEIQO**

SHOW CARD C9

Compared with two years ago, how is at handling financial matters, like the pension or dealing with the bank?

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

**HEIQP**

SHOW CARD C9

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

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

**HEIQQ**

SHOW CARD C9

Compared with two years ago, how is at using intelligence to understand what's going on and to reason things through?

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

END FILTER

**HEPAIN**

Are you often troubled with pain?

- 1 Yes
- 2 No

*IF @/Are you often troubled with = Yes [HePain = 1]*

**HEPAA**

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

INTERVIEWER: Read out...

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

**HEPAWH**

SHOW CARD C10

In which parts of the body do you feel pain?

CODE ALL THAT APPLY.

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

[code maximum 7 out of 7 possible responses]

*IF (((HePaWh = Back) OR (HePaWh = Hips)) OR (HePaWh = Knees)) OR  
/ / / (HePaWh = Feet)) OR (HePaWh = All) [HePaWh = 1 OR HePaWh = 2 OR  
/ / / HePaWh = 3 OR HePaWh = 4 OR HePaWh = 7]*

**HEPAB**

How would you rate your pain if you were walking on a flat surface?

Please rate your pain from 0-10 for each of the following where 0 is no pain and 10 is severe or excruciating pain, as bad as you can imagine.

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

*IF (HePab = CantW) AND (QHE1.Qre.HeFunc IN [None .. Some])  
/ / / [HePab = 2 AND QHE1.Qre.HeFunc = None .. Some]*

**HEPAB1**

Interviewer check whether ever walks on a flat surface.

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

END FILTER

END FILTER

*IF ((HePaWh = Back) OR (HePaWh = All)) AND (HePab1 <> NoWalk)*  
*[HePaWh = 1 OR HePaWh = 7 AND HePab1 <> 1]*

**HEBCK**

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

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

Range: 0..10

END FILTER

*IF ((HePaWh = Hips) OR (HePaWh = All)) AND (HePab1 <> NoWalk)*  
*[HePaWh = 2 OR HePaWh = 7 AND HePab1 <> 1]*

**HEHIP**

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

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

Range: 0..10

END FILTER

*IF ((HePaWh = Knees) OR (HePaWh = All)) AND (HePab1 <> NoWalk)*  
*[HePaWh = 3 OR HePaWh = 7 AND HePab1 <> 1]*

**HEKNE**

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

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

Range: 0..10

END FILTER

*IF ((HePaWh = Feet) OR (HePaWh = All)) AND (HePab1 <> NoWalk)*  
*[HePaWh = 4 OR HePaWh = 7 AND HePab1 <> 1]*

**HEFET**

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

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

Range: 0..10

END FILTER

END FILTER

*IF ((HeKne IN [6 .. 10]) OR (HeHip IN [6 .. 10])) AND (Osteo IN QHE4.Qre  
[PNum].HeArt) [HeKne = 6 , 7, 8, 9, 10 OR HeHip = 6 , 7, 8, 9, 10 AND Osteo =  
QHE4.Qre.HeArt]*

**HEPAC**

Has your knee or hip pain been bothering you for more than six months?

- 1 Yes
- 2 No

*IF @/Has your knee or hip pain be = Yes [HePac = 1]*

**HEPAD**

Are you taking or have you taken any medication or exercises to control the pain in your knee or hip?

- 1 Yes
- 2 No

*IF @/Are you taking or have you t = Yes [HePad = 1]*

**HEPAE**

Do exercises and medicines control the pain in your knee or hip?

- 1 Yes
- 2 No

*IF @/Do exercises and medicines c = No [HePae = 2]*

**HEPAF**

Did any doctor recommend that you should have surgery or joint replacement?

- 1 Yes
- 2 No

*IF @/Did any doctor recommend tha = Yes [HePaf = 1]*

**HEPAF1**

Did you see an orthopaedic specialist?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF ((HeKne IN [1 .. 5]) AND NOT (HeHip IN [6 .. 10])) AND (Osteo IN  
QHE4.Qre[PNum].HeArt) [HeKne = 1 , 2, 3, 4, 5 AND NOT HeHip = 6 , 7, 8, 9,  
10 AND Osteo = QHE4.Qre.HeArt]*

**HEKNEA**

Has your knee pain been bothering you for more than 3 months?

- 1 Yes
- 2 No

*IF @/Has your knee pain been both = Yes [HeKnea = 1]*

**HEKNEB**

Has a doctor or nurse suggested that you receive physiotherapy or attend a supervised exercise program for your knee pain?

- 1 Yes
- 2 No

*IF @/Has a doctor or nurse sugges = Yes [HeKneb = 1]*

**HEKNEC**

Did you see a physiotherapist or attend a supervised exercise program for your knee pain?

- 1 Yes
- 2 No

*IF @/Did you see a physiotherapis = Yes [HeKnec = 1]*

**HEPAK1**

How well does the treatment control your pain?

- 1 Very well
- 2 Fairly well
- 3 Not very well
- 4 Not at all

END FILTER

END FILTER

END FILTER

END FILTER

**HEANINT**

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

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

**HEANA**

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

- 1 Yes
- 2 No

*IF @/Have you ever had any pain o = Yes [HeAna = 1]*

**HEANB**

Do you get it when you walk uphill or hurry?

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

*IF @/Do you get it when you walk = Sotimes [HeAnb = 3]*

**HEANC**

Does this happen on most occasions?

- 1 Yes
- 2 No

END FILTER

*IF @/Do you get it when you walk IN [Yes, Sotimes, NeverDo] [HeAnb = 1, 3, 4]*

**HEAND**

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

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

*IF (HeAnd = Notwalk) OR ((HeAnb = NeverDo) AND (HeAnd = No))*

*[HeAnd = 4 OR HeAnb = 4 AND HeAnd = 2]*

**HEAND1**

Do you never because... READ OUT...

**CODE ONE ONLY**

- 1 ...it causes chest pain to do so,
- 2 ...it causes other discomfort to do so,
- 3 ...you prefer not to,
- 4 or, for some other reason?

ELSE

*IF @/Do you get it when you walk = Sotimes [HeAnd = 3]*

**HEANE**

Does this happen on most occasions?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

*IF (((HeAnb = Yes) OR (HeAnc = Yes)) OR (HeAnd = Yes)) OR (HeAne = Yes) [HeAnb = 1 OR HeAnc = 1 OR HeAnd = 1 OR HeAne = 1]*

**HEANF**

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

INTERVIEWER: Read out...

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

*IF @/What do you do if you get it IN [Stop, Slow] [HeAnf = 1, 2]*

**HEANG**

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

INTERVIEWER: If respondent unsure, PROBE - 'What happens to the pain on most

occasions?'

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

IF @/If you stand still does the = Paingo [HeAng = 1]

**HEANH**

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

INTERVIEWER: Read out...

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

IF @/How soon does the pain go aw = LessTen [HeAnh = 1]

**HEANI**

SHOW CARD C11

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

INTERVIEWER:PROBE - 'Where else?'

Code all that apply.

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

[code maximum 7 out of 7 possible responses]

IF (EditQre = Yes) AND (HeAni = Other) [EditQre = 1 AND HeAni = 95]

**HEANIZ**

EDITOR: Back code here. CODE FRAME 3

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

INTERVIEWER:PROBE - 'Where else?'

Code all that apply.

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

6 Right arm  
85 Other answer - not codeable 01-06  
86 Irrelevant response - not codeable 01-06  
95 Somewhere else  
[code maximum 9 out of 9 possible responses]

END FILTER

*IF (HeAni = Other) AND ((EditQre <> Yes) OR (HeAniZ =  
EMPTY OR (HeAniZ = Other))) [HeAni = 95 AND EditQre <> 1 OR  
HeAniZ = EMPTY OR HeAniZ = 95]*

**HEANJ**

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

INTERVIEWER: WRITE IN.  
String: 40

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

**HEANK**

Have you ever had a severe pain across the front of your chest lasting for half an hour or more?

- 1 Yes
- 2 No

*IF (((HeAni = Upster) OR (HeAni = Lowster)) OR (HeAni = Leftches)) OR  
(HeAni = Leftarm)) OR (HeAnk = Yes) [HeAni = 1 OR HeAni = 2 OR HeAni = 3  
OR HeAni = 4 OR HeAnk = 1]*

**HEROSMD**

take medication to control chest pain?

- 1 Yes
- 2 No

END FILTER

**HERPA**

Do you usually bring up any phlegm from your chest, first thing in the morning in winter?

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

*IF (HeRpa = No) OR (HeRpa = DKnow) [HeRpa = 2 OR HeRpa = 3]*

**HERPB**

Do you usually bring up any phlegm from your chest, during the day or at night in the winter?

- 1 Yes
- 2 No

END FILTER

*IF (HeRpa = Yes) OR (HeRpb = Yes) [HeRpa = 1 OR HeRpb = 1]*

**HERPC**

Do you bring up phlegm like this on most days for as much as three months each year?

- 1 Yes
- 2 No

END FILTER

*IF NOT (QHE6.Qre.HeAnb = Notwalk) [NOT QHE6.Qre.HeAnb = Notwalk]*

**HERPD**

Are you troubled by shortness of breath when hurrying on level ground or walking up a slight hill?

- 1 Yes
- 2 No
- 3 Never walks up hill or hurries
- 4 Cannot walk

END FILTER

*IF @/Are you troubled by shortnes IN [Yes, NeverDo] [HeRpd = 1, 3]*

**HERPE**

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

- 1 Yes

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

*IF (HeRpe = NeverDo) OR ((HeRpe = No) AND (HeRpd = NeverDo))  
[HeRpe = 3 OR HeRpe = 2 AND HeRpd = 3]*

**HERPE1**

Do you never because... READ OUT...

CODE ONE ONLY

- 1 ...it makes you short of breath to do so,
- 2 ...it causes other discomfort to do so,
- 3 ...you prefer not to,
- 4 or, for some other reason?

END FILTER

*IF @/Do you get short of breath w IN [Yes, No] [HeRpe = 1, 2]*

**HERPF**

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

- 1 Yes
- 2 No

END FILTER

END FILTER

**HERPG**

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

- 1 Yes
- 2 No

**HERPH**

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

- 1 Yes
- 2 No

**HERPI**

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

- 1 Yes
- 2 No

*IF @/Have you ever had attacks of = Yes [HeRpi = 1]*

**HERPJ**

Is/Was your breathing absolutely normal between attacks?

- 1 Yes
- 2 No

END FILTER

**HECDA**

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

- 1 Yes
- 2 No
- 3 Cannot walk

*IF @/Do you get pain or discomfort = Yes [HeCda = 1]*

**HECDB**

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

- 1 Yes
- 2 No

**HECDC**

Do you get it if you walk uphill or hurry?

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

**HECDD**

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

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

*IF (HeCdd = NeverDo) OR ((HeCdc = NeverDo) AND (HeCdd = No))*

*[HeCdd = 3 OR HeCdc = 3 AND HeCdd = 2]*

**HECDD1**

Do you never because ... READ OUT...

CODE ONE ONLY.

- 1 ...it causes you pain or discomfort in your legs,
- 2 ...it causes other discomfort to do so,

- 3 ...you prefer not to,
- 4 or, for some other reason?

END FILTER

*IF (HeCdc = Yes) OR (HeCdd = Yes) [HeCdc = 1 OR HeCdd = 1]*

**HECDE**

If you stand still does the pain usually...

INTERVIEWER: Read out...

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

END FILTER

**HECDF**

Where do you get this pain or discomfort? Is it in the...

INTERVIEWER: Read out each in turn and code all that apply.

- 1 ... Calf muscle?
- 2 ... Thigh or buttocks?
- 3 ... Somewhere else?

[code maximum 3 out of 3 possible responses]

END FILTER

**HEADLA**

SHOW CARD C12

Because of a physical or health problem, have difficulty doing any of the activities on this card? Exclude any difficulties that you expect to last less than three months.

INTERVIEWER:PROBE - 'What others?'----Code all that apply.

- 01 Walking 100 yards
- 02 Sitting for about two hours
- 03 Getting up from a chair after sitting for long periods
- 04 Climbing several flights of stairs without resting
- 05 Climbing one flight of stairs without resting
- 06 Stooping, kneeling, or crouching
- 07 Reaching or extending arms above shoulder level (either arm)
- 08 Pulling or pushing large objects like a living room chair
- 09 Lifting or carrying weights over 10 pounds, like a heavy bag of groceries
- 10 Picking up a 5p coin from a table

96 None of these  
[code maximum 10 out of 11 possible responses]

**HEADLB**

SHOW CARD C13

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

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

INTERVIEWER:PROBE - 'What others?'...Code all that apply.

- 01 Dressing, including putting on shoes and socks
- 02 Walking across a room
- 03 Bathing or showering
- 04 Eating, such as cutting up food
- 05 Getting in or out of bed
- 06 Using the toilet, including getting up or down
- 07 Using a map to figure out how to get around in a strange place
- 08 Preparing a hot meal
- 09 Shopping for groceries
- 10 Making telephone calls
- 11 Taking medications
- 12 Doing work around the house or garden
- 13 Managing money, such as paying bills and keeping track of expenses
- 96 None of these

[code maximum 14 out of 14 possible responses]

*IF ((HeADLa = RESPONSE) AND NOT (HeADLa = None)) OR ((HeADLb = RESPONSE) AND NOT (HeADLb = None)) [HeADLa = RESPONSE AND NOT HeADLa = 96 OR HeADLb = RESPONSE AND NOT HeADLb = 96]*

**HEHPA**

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

- 1 Yes
- 2 No

*IF (((HeADLa = stairs) OR (HeADLb = room)) OR (HeADLb = bed)) OR (HeADLb = toilet) [HeADLa = 4 OR HeADLb = 2 OR HeADLb = 5 OR HeADLb = 6]*

**HEHPH**

SHOW CARD C14

Who, if anyone, helps with moving around the house (including getting to the toilet or getting in and out of bed)?

INTERVIEWER:PROBE - 'Does anyone else help with these activities?'

Code all that  
apply.

- 01 Husband or wife or partner
- 02 Mother or father
- 03 Son
- 04 Son-in-law
- 05 Daughter
- 06 Daughter-in-law
- 07 Sister
- 08 Brother
- 09 Grandson
- 10 Granddaughter
- 11 Other relative
- 12 Home help or care arranged by social services
- 13 Home help or care arranged privately
- 14 Nurse, e.g. district nurse or health visitor
- 15 Someone else from the health or social services
- 16 Someone from a voluntary organisation (e.g. Age Concern...)
- 17 Friend or neighbour
- 95 Other person
- 96 not get any help

[code maximum 19 out of 19 possible responses]

END FILTER

IF (HeADLb = dress) OR (HeADLb = bathe) [HeADLb = 1 OR HeADLb =  
3]

**HEHPW**

SHOW CARD C14

Who, if anyone, helps you with [^bathing/showering/  
getting dressed/ bathing/showering and dressing]?

- 01 Husband or wife or partner
- 02 Mother or father
- 03 Son
- 04 Son-in-law
- 05 Daughter
- 06 Daughter-in-law
- 07 Sister
- 08 Brother
- 09 Grandson
- 10 Granddaughter
- 11 Other relative
- 12 Home help or care arranged by social services
- 13 Home help or care arranged privately
- 14 Nurse, e.g. district nurse or health visitor
- 15 Someone else from the health or social services
- 16 Someone from a voluntary organisation (e.g. Age Concern...)

- 17 Friend or neighbour
  - 95 Other person
  - 96 not get any help
- [code maximum 19 out of 19 possible responses]

END FILTER

*IF (HeADLb = eating) OR (HeADLb = mealprep) [HeADLb = 4 OR HeADLb = 8]*

**HEHPD**  
SHOW CARD C14

Who, if anyone, helps you with [^eating (such as cutting up your food) and preparing a hot meal/ eating (such as cutting up your food)/ preparing a hot meal]?

- 01 Husband or wife or partner
  - 02 Mother or father
  - 03 Son
  - 04 Son-in-law
  - 05 Daughter
  - 06 Daughter-in-law
  - 07 Sister
  - 08 Brother
  - 09 Grandson
  - 10 Granddaughter
  - 11 Other relative
  - 12 Home help or care arranged by social services
  - 13 Home help or care arranged privately
  - 14 Nurse, e.g. district nurse or health visitor
  - 15 Someone else from the health or social services
  - 16 Someone from a voluntary organisation (e.g. Age Concern...)
  - 17 Friend or neighbour
  - 95 Other person
  - 96 not get any help
- [code maximum 19 out of 19 possible responses]

END FILTER

*IF (HeADLb = grocery) OR (HeADLb = home) [HeADLb = 9 OR HeADLb = 12]*

**HEHPP**  
SHOW CARD C14

Who, if anyone, helps you with [^shopping for groceries and doing work around the house or garden/ shopping for groceries/ doing work around the house or garden]?

- 01 Husband or wife or partner
- 02 Mother or father
- 03 Son

- 04 Son-in-law
  - 05 Daughter
  - 06 Daughter-in-law
  - 07 Sister
  - 08 Brother
  - 09 Grandson
  - 10 Granddaughter
  - 11 Other relative
  - 12 Home help or care arranged by social services
  - 13 Home help or care arranged privately
  - 14 Nurse, e.g. district nurse or health visitor
  - 15 Someone else from the health or social services
  - 16 Someone from a voluntary organisation (e.g. Age Concern...)
  - 17 Friend or neighbour
  - 95 Other person
  - 96 not get any help
- [code maximum 19 out of 19 possible responses]

END FILTER

*IF (HeADLb = phone) OR (HeADLb = money) [HeADLb = 10 OR HeADLb = 13]*

**HEHPT**

SHOW CARD C14

Who, if anyone, helps you with [^making telephone calls and managing money (such as paying bills and keeping track of expenses)/ making telephone calls/ managing money (such as paying bills and keeping track of expenses)]?

- 01 Husband or wife or partner
  - 02 Mother or father
  - 03 Son
  - 04 Son-in-law
  - 05 Daughter
  - 06 Daughter-in-law
  - 07 Sister
  - 08 Brother
  - 09 Grandson
  - 10 Granddaughter
  - 11 Other relative
  - 12 Home help or care arranged by social services
  - 13 Home help or care arranged privately
  - 14 Nurse, e.g. district nurse or health visitor
  - 15 Someone else from the health or social services
  - 16 Someone from a voluntary organisation (e.g. Age Concern...)
  - 17 Friend or neighbour
  - 95 Other person
  - 96 not get any help
- [code maximum 19 out of 19 possible responses]

END FILTER  
*IF (HeADLb = phone) OR (HeADLb = money) [HeADLb = 10 OR  
HeADLb = 13]*

**HEHPM**

SHOW CARD C14

Who, if anyone, helps you with taking medication?

- 01 Husband or wife or partner
- 02 Mother or father
- 03 Son
- 04 Son-in-law
- 05 Daughter
- 06 Daughter-in-law
- 07 Sister
- 08 Brother
- 09 Grandson
- 10 Granddaughter
- 11 Other relative
- 12 Home help or care arranged by social services
- 13 Home help or care arranged privately
- 14 Nurse, e.g. district nurse or health visitor
- 15 Someone else from the health or social services
- 16 Someone from a voluntary organisation (e.g. Age Concern...)
- 17 Friend or neighbour
- 95 Other person
- 96 not get any help

[code maximum 19 out of 19 possible responses]

END FILTER

**HEHPC**

Would you say that the help receive...

INTERVIEWER: Read out...

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

END FILTER

*IF ((HeADLa = RESPONSE) AND NOT (HeADLa = None)) OR ((HeADLb =  
RESPONSE) AND NOT (HeADLb = None)) [HeADLa = RESPONSE AND NOT  
HeADLa = 96 OR HeADLb = RESPONSE AND NOT HeADLb = 96]*

**HEHPS**

SHOW CARD C15

currently use any of the services listed on this card?

CODE ALL THAT APPLY.

- 1 Occupational therapist or physiotherapist
- 2 Chiropodist
- 3 Exercise classes run by the local authority
- 4 Exercise classes run by a voluntary organisation
- 95 Other
- 96 None of these

[code maximum 4 out of 6 possible responses]

**HEHPSO**

INTERVIEWER: Please specify other answer.

String: 80

END FILTER

END FILTER

**HECLUB**

Have you ever used the following services ...READ OUT...

CODE ALL THAT APPLY.

- 1 Lunch club?
- 2 Day care centre?
- 3 Meals on wheels?
- 96 None of these

[code maximum 4 out of 4 possible responses]

**HELC**

SHOW CARD C16

How often do you attend a lunch club?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END FILTER

**HEDCC**

SHOW CARD C16

How often do you attend a day care centre?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END FILTER

**HEMW**

SHOW CARD C16

How often do you eat a meal provided by Meals on Wheels?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END FILTER

*IF ((HeADLa = RESPONSE) AND NOT (HeADLa = None)) OR ((HeADLb =  
RESPONSE) AND NOT (HeADLb = None)) [HeADLa = RESPONSE AND NOT  
HeADLa = 96 OR HeADLb = RESPONSE AND NOT HeADLb = 96]*

**HEAID**

use any of the following?

INTERVIEWER:Read out and code all that apply.

Only include personal alarms used to call  
for assistance after falls etc.

- 1 A cane or walking stick
- 2 A zimmer frame or walker
- 3 A manual wheelchair
- 4 An electric wheelchair
- 5 A buggy or scooter

- 6 Special eating utensils
  - 7 A personal alarm
  - 8 Elbow crutches
  - 96 None of these
- [code maximum 8 out of 9 possible responses]

END FILTER

**HEINCT**

We would like to ask you about incontinence.

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

- 1 Yes
- 2 No

*IF @/We would like to ask you abo = Yes [HeInct = 1]*

**HEINCTA**

When you had this problem, did it last for more than 1 month?

- 1 Yes
- 2 No

END FILTER

*IF @/^CHaveHas[pnum] ^youname[pnu <> RESPONSE [IFFW  
/ / [PNum].HeSmk <> RESPONSE]*

**HESMK**

ever smoked cigarettes?

- 1 Yes
- 2 No

END FILTER

*IF ((HeSmk = RESPONSE) AND (HeSmk <> No)) OR @/^CHaveHas[pnum]  
/ / ^youname[pnu = RESPONSE) [HeSmk = RESPONSE AND HeSmk <> 2 OR  
/ / IFFW[PNum].HeSmk = RESPONSE]*

**HESKA**

smoke cigarettes at all nowadays?

- 1 Yes
- 2 No

END FILTER

*IF @/^DoDoes[PNum] ^youname[PNum] = Yes) AND (HESka = No) [IFFW*

| | | [PNum].HESka = Yes AND HESka = 2]

| | | **HESKD**

| | | The last time we interviewed you , you said that you were smoking at that time.

| | | INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

- | | | 1 Yes
- | | | 2 No

| | | IF @/The last time we interviewed = No [HeSkd = 2]

| | | **HESKE**

| | | INTERVIEWER: Code reason why respondent disputes the record.  
Respondent says...

- | | | 1 Never smoked cigarettes
- | | | 2 No longer smoking cigarettes by last interview
- | | | 3 Stopped smoking cigarettes since last interview

| | | ELSE

| | | IF @/The last time we interviewed = Yes [HeSkd = 1]

| | | **HESKF**

| | | INTERVIEWER: Code response given by respondent

- | | | 1 Does smoke cigarettes nowadays
- | | | 2 Stopped smoking cigarettes since last interview

| | | END FILTER

| | | END FILTER

| | | IF (HeSke = StopSmo) OR (HeSkf = StopSmok) [HeSke = 3 OR HeSkf = 2]

| | |

| | | **HESTOP**

| | | SHOW CARD C17

| | | What was the main reason that you stopped smoking cigarettes?

- | | | 01 Doctor or nurse said I should stop
- | | | 02 It is unhealthy
- | | | 03 It is expensive / to save money
- | | | 04 Pressure from family or friends

- 05 Worried about effect of passive smoke on people around me
- 06 Stopped enjoying it
- 07 Cosmetic reasons (e.g. smell, stained teeth, fingers, hair)
- 08 It's becoming harder to smoke in public or at work
- 09 Advertising
- 95 Other (SPECIFY)

*IF @/SHOW CARD C17 @/What was the = Other [HeStop = 95]*

**HESTOPA**

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

END FILTER

END FILTER

END FILTER

**HECIG**

Do you smoke cigarettes or roll ups?

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

*IF @/Do you smoke cigarettes or r IN [Cigso, Both] [HECig = 1, 3]*

**HESKB**

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

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

If less than one a day, enter

0.

Range: 0..997

**HESKC**

About how many cigarettes a day do you usually smoke at weekends?

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

If less than one a day, enter

0.

Range: 0..997

END FILTER

IF @/Do you smoke cigarettes or r IN [Rollso, Both] [HECig = 2, 3]

**HETBA**

How much tobacco do you normally smoke on a weekday?

INTERVIEWER: Code how answer is given.

- 1 Grams
- 2 Ounces

**HETBB**

(How much tobacco do you normally smoke on a weekday?)

INTERVIEWER: Enter amount.

Range: 0..997

**HETBC**

How much tobacco do you normally smoke a day at weekends?

INTERVIEWER: Code how answer is given.

- 1 Grams
- 2 Ounces

**HETBD**

(How much tobacco do you normally smoke a day at weekends?)

INTERVIEWER: Enter amount.

Range: 0..997

END FILTER

**HEACTA**

SHOW CARD C18

We would like to know the type and amount of physical activity involved in daily life.

take part in sports or activities that are vigorous...

INTERVIEWER: Read out...

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

**HEACTB**

SHOW CARD C18

And take part in sports or activities that are moderately energetic...

INTERVIEWER: Read out...

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

**HEACTC**

SHOW CARD C18

And take part in sports or activities that are mildly energetic...

INTERVIEWER: Read out...

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

**HETSET**

INTERVIEWER: The Health section is finished.

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

Range: 1..1

**SOCIAL PARTICIPATION  
MODULE  
(SP)**

**SPCAR HAS USE OF CAR OR VAN**

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

- 1 Yes
- 2 No

*IF has use of car or van = Yes [SPCar = 1]*

**SPCARA PERSONALLY DRIVES**

Do you ever drive this car or van yourself?

- 1 Yes
- 2 No, passenger only

END FILTER

*IF (SPCar = No) OR (SPCarA = No) [SPCar = 2 OR SPCarA = 2]*

**SPCARB PERSONALLY DROVE IN THE PAST**

In the past did you drive a car or van yourself?

- 1 Yes
- 2 No

END FILTER

**SPTRAA HOW OFTEN USES PUBLIC TRANSPORT  
SHOW CARD D1**

How often do you use public transport?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 Never

*IF how often uses public transport IN [TwoM .. Never] [SpTraA = 4 , 5, 6]*

//

**SPTRAB REASONS NOT USE PUBLIC TRANSPORT**

SHOW CARD D2 Why don't you use public transport more often?

PROBE: What else?

CODE ALL THAT APPLY.

- 01 No public transport available
- 02 Public transport available does not take me where I want to go
- 03 Too expensive
- 04 Unreliable
- 05 Infrequent

06 My health prevents me  
07 Do not need to  
08 Fear of crime  
09 Too dirty  
10 Not convenient  
11 Prefer to walk  
95 Other (specify)  
[code maximum 7 out of 12 possible responses]

*IF (EditQre = Yes) AND (SPTraB = other) [EditQre = 1 AND SPTraB = 95]*

**SPTRAZ REASONS NOT USE PUBLIC TRANSPORT**

EDITOR: Back code here - CODE FRAME 5

Why don't you use public transport more often?

CODE ALL THAT APPLY

- 01 No public transport available
- 02 Public transport available does not take me where I want to go
- 03 Too expensive
- 04 Unreliable
- 05 Infrequent
- 06 My health prevents me
- 07 Do not need to
- 08 Fear of crime
- 09 Too dirty
- 10 Not convenient
- 11 Prefer to walk
- 85 Other answer - not codeable 01 to 10
- 86 Irrelevant response - not codeable 01 to 10
- 95 Other (specify)

[code maximum 14 out of 14 possible responses]

END FILTER

*IF (SPTraB = other) AND ((EditQre <> Yes) OR (SPTraZ = EMPTY OR (SPTraZ = other))) [SPTraB = 95 AND EditQre <> 1 OR SPTraZ = EMPTY OR SPTraZ = 95]*

**SPPUBX OTHER REASONS**

INTERVIEWER: Enter details of other reasons.

String: 60

END FILTER

END FILTER

*IF (IAgeOf >= 65) OR (SPCarA = No) [IAgeOf >= 65 OR SPCarA = 2]*

**SPTRO USE OF MEANS OF TRANSPORT (AGE 65+)**

SHOW CARD D3

Do you ever use any of the following means of transport?

CODE ALL THAT APPLY.

- 1 Lifts from family or friends who do not live with you
- 2 Taxi
- 3 Door-to-door community transport, e.g dial-a-ride
- 4 Transport provided by hospital / day centre / lunch club
- 96 None of these

[code maximum 4 out of 5 possible responses]

**SPLIFT**

SHOW CARD D4 How often do you get lifts from family or friends who do not live with you?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END FILTER

**SPTAXI**

SHOW CARD D4 How often do you use a taxi?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END FILTER

**SPDTDT**

SHOW CARD D4 How often do you use door-to-door community transport?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END FILTER

**SPHOSP**

SHOW CARD D4 How often do you use transport provided by the hospital/day centre/lunch club?

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 SPONTANEOUS - do not currently use

END FILTER

END FILTER

**SPTSET**

INTERVIEWER: The Social Participation section is finished.

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

Range: 1..1

*IF MMStarted[IndNo] = No [MMStarted[IndNo] = No]*

**REMINDA**

INTERVIEWER: Do you wish to do the Walking Test now?

- To enter the measurements questionnaire, press <Ctrl Enter>.

- Else, press <Enter> to continue.

Range: 1..1

END FILTER

**WORK AND PENSIONS  
MODULE  
(WP)**

**WPINT\*@**

Now I have some questions about work, retirement and pensions.

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

**WPACT\***

SHOW CARD E1

Did you do any of these activities during the last month?

IF YES, PROBE: Which ones?

CODE ALL THAT APPLY.

- 1 Paid work
- 2 Self-employment
- 3 Voluntary work
- 4 Cared for someone
- 5 Looked after home or family
- 6 Attended a formal educational or training course
- 96 None of these

**[Responses to Wpact are recorded in variables Wpac1-Wpac96: each of these binary variables relates to one of the different binary response categories available]**

*IF NOT (WpAct = paidw) AND NOT (WpAct = SEMPL) [NOT WpAct = 1  
AND NOT WpAct = 2]*

|

| **WPAWAY\***

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

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

|

END FILTER

*Derivation of WpActW:*

*IF (WpAct = 1) OR (WpAct = 2) THEN WpActW:= PaidW*

*ELSEIF (Wpaway = 1) THEN WpActW:= tempaway*

*ELSEIF (WPaway = 3) THEN WpActW:= waitwork*

*ELSEIF (WpAct = RESPONSE OR WpAway = RESPONSE) THEN WpActw:= Nowork*

*IF Derived - to give prioritised = tempaway [WPActW = 2]*

|

| **WPTAW\***

| EDITOR: CODE FRAME 6

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

| CODE ONE ONLY

- | 01 Leave/holiday
- | 02 Sick/injured
- | 03 Attending a training course
- | 04 Laid off/on short time
- | 05 On strike

- | 06 Maternity/Paternity leave
- | 07 Other personal/family reasons
- | 85 Other answer - not codeable 01-07
- | 86 Irrelevant answer - not codeable 01-07
- | 95 Other reasons (SPECIFY)

| *IF EDITOR: CODE FRAME 6 @/What wa = Other [WpTaw = 95]*

| **WPTAWO\*@**

| INTERVIEWER WRITE IN OTHER REASON

| String: 60

| END FILTER

END FILTER

**WPDES\***

SHOW CARD E2

Which one of these, would you say best describes your current situation?

CODE ONE ONLY.

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

| *IF @/SHOW CARD E2 @/Which one of = Other [WpDes = 95]*

| **WPDESA\*@**

| INTERVIEWER: Write in the other situation.

| String: 60

| END FILTER

| *IF NOT (WpAct = EdCourse) [NOT WpAct = 6]*

| **WPEDC\***

| Have you taken a formal educational or training course in the last 12 months?

- | 1 Yes
- | 2 No

| END FILTER

**WPVW\***

How often do you do voluntary work? Is it ... READ OUT ...

- 1 ... twice a month or more,
- 2 about once a month,
- 3 every few months,

- 4 about once or twice a year,
- 5 less than once a year,
- 6 or, never?

*IF NOT (QWPA.Qre.WPActW IN [paidw, tempaway, waitwork]) AND (AgeP < 70) [NOT QWPA.Qre.WPActW = paidw, tempaway, waitwork AND AgeP[pnum] < 70]*

| *IF IFFW[pnum].WpActw = nowork [IFFW[pnum].WpActw = nowork]*

| | **WPJOB\***

| | Can I just check, have you had a paid job since last time we interviewed ?  
 | | INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

- | | 1 Yes
- | | 2 No

| | ELSE

| | *IF IFFW[pnum].WpActw IN [paidw, tempaway, waitwork] [IFFW [pnum].WpActw = paidw, tempaway, waitwork]*

| | | **WPJOB\***

| | | Last time we interviewed you, you were [^working/about to start work] as a [^job title]. Is this still your most recent job?  
 | | | Is this most recent job?

| | | INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

- | | | 1 Yes
- | | | 2 No

| | END FILTER

| END FILTER

END FILTER

*IF (QWPA.Qre.WPActW IN [paidw, tempaway]) AND (IFFW.WpActw IN [paidw, tempaway, waitwork]) [QWPA.Qre.WPActW = paidw, tempaway AND IFFW[pnum].WpActw = paidw, tempaway, waitwork]*

| **WPSTJ\***

| Last time we interviewed you, you were [^working/about to start work] as a [^job title].  
 | Is this still main job?

| INTERVIEWER:Job = A period of paid work with an employer or a period of continuous self-employment.

| If more than one job, main = the job with most hours.

| If equal hours: main = the highest paid job.

- | 1 Yes
- | 2 No

| IF IFFW[pnum].WpESd = Employee [IFFW[pnum].WpESd = Employee]

| | **WPEMP\***

| | Are you still working for the same employer?

| | INTERVIEWER:If self-employed, code 'no'

| | 1 Yes

| | 2 No

| | END FILTER

| END FILTER

| IF (QWPA.Qre.WPActW = nowork) AND (IFFW.WpActw <> RESPONSE)  
| [QWPA.Qre.WPActW = nowork AND IFFW[pnum].WpActw <> RESPONSE]

| | **WPEVER\***

| | Have you ever done any paid work?

| | 1 Yes

| | 2 No

| | END FILTER

**WpAskD**

Computed: Ask Wpido or not

**WpAskE**

Computed: Ask Wpest or not

**WpAskF**

Computed: Ask Wpdet or not

IF (Wpactw IN [PaidW, Tempaway, WaitWork]) AND (IFFW[PNum].WpActW = NoWork  
OR IFFW[PNum].WpActw <> RESPONSE)  
THEN WpAskD:= Yes; WpAskE:= Yes; WpAskF:= Yes

IF (WPActw IN [waitwork])  
THEN WpAskD:= Yes; WpAskE:= Yes; WpAskF:= Yes

IF WPJob = Yes OR Wpjobl = No OR WPstj = No OR Wpever = Yes  
THEN WpAskD:= Yes; WpAskE:= Yes; WpAskF:= Yes

IF (IFFW[pnum].SOC <> SOC2000 AND ((WpJobl = Yes) OR (WpStj = Yes AND  
WpEmp = Yes) OR (WpStj = Yes AND IFFW[PNum].WpESd <> EMPTY AND  
IFFW[PNum].WpESd <> employee)))  
THEN WpAskD:= Yes; WpAskE:= Yes

IF (IFFW[pnum].SOC <> SOC2000 AND IFFW[pnum].Jobtitle <> RESPONSE AND  
((WpJobl = Yes) OR (WpStj = Yes AND WpEmp = Yes) OR (WpStj = Yes AND  
IFFW[PNum].WpESd <> EMPTY AND IFFW[PNum].WpESd <> employee)))  
THEN WpAskf:= Yes

IF IFFW[pnum].SOC <> SOC2000 AND (WpJob = No) AND (IFFW[PNum].WpEver = yes)

THEN WPAaskD:= Yes; WPAaskE:= Yes; WPAaskF:= Yes

IF WpStj = Yes AND IFFW[PNum].wpelsa <> elsaw1 AND (WpEmp = Yes OR (IFFW[PNum].WpEsd <> EMPTY AND IFFW[PNum].WpEsd <> employee))

THEN WpASkE:= Yes

IF WpStj = Yes AND WpEmp = No

THEN WpASkD:= Yes; WpASkE:= Yes

IF (Wpstj = No) OR (WpEmp = No) [Wpstj = 2 OR WpEmp = 2]

**WPLJOB\***

SHOW CARD E3

What were reasons for leaving your previous [^employer/job]?

CODE ALL THAT APPLY

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 To spend more time with partner/family
- 08 Career progression
- 09 Fed up with job and wanted a change
- 10 Moved to a different area
- 95 Other reason

[code maximum 11 out of 11 possible responses]

**[Responses to Wpljob are recorded in variables wpljb1-wpljb95 each of these binary variables relates to one of the different binary response categories available]**

IF (WpLJob = other)

**WPLJOBX @**

What was this reason?

String: 60

**[Open responses to Wpljobx are coded and merged with the multiple responses to Wpljob in variables WpLJM1-Wpljm86]**

**WPLJM**

CODE ALL THAT APPLY

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 To spend more time with partner/family
- 08 Career progression

- 09 Fed up with job and wanted a change
- 10 Moved to a different area
- 11 Found a better job (in terms of salary, employment conditions or location)
- 12 Contract finished
- 13 Got promoted
- 14 Took early retirement/retired
- 15 To have more time for self
- 16 Salary not high enough
- 17 Company merged/changes in employer's status
- 85 Other answer (not codeable 1-17)
- 86 Irrelevant response

END FILTER

*IF WpLJob = RESPONSE*

*IF WpLJob.CARDINAL > 1*

**WPLJOBM\***

MERGED AFTER EDIT

What was your main reason for leaving your previous [^employer/job]?

CODE ONE ONLY

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 To spend more time with partner/family
- 08 Career progression
- 09 Fed up with job and wanted a change
- 10 Moved to a different area
- 85 Other answer - not codeable 01 to 10
- 86 Irrelevant response - not codeable 01 to 10
- 95 Other reason

END FILTER

END FILTER

*IF IFFW[pnum].WpESd = Employee AND WpLJob = 1 OR WpLJob = 2*

**WPCHG\***

SHOW CARD E4

If work had been changed in any of these ways, would you have been able to continue working?

IF YES: Which of these changes would have enabled to continue working?

CODE ALL THAT APPLY

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing

- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 96 None of these

[code maximum 7 out of 7 possible responses]

**[Responses to WpChg are recorded in variables WpCh1-WpCh96: each of these binary variables relates to one of the different binary response categories available]**

*IF WpChg = 96*

**WPCHGNON\***

Would anything else have enabled you to stay?

- 1 Yes
- 2 No

**[Responses are recorded in variable WpChgNo]**

*IF (WpChgnon = Yes)*

**WPCHGX @**

What was this change?

String: 60

**[Open responses to WpChgX are coded and merged with the multiple responses to WpChg in variables Wpchm1-Wpchm96]**

**WPCHM\***

CODE ALL THAT APPLY

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 7 Salary increase
- 8 A new boss/new management
- 85 Other answer (not codeable 1-8)
- 86 Irrelevant response
- 96 None of these

END FILTER

END FILTER

*IF (WpChg = RESPONSE) AND NOT ((WpChg.CARDINAL = 1) AND (WpChg = none))*

**WPCHGO\***

SHOW CARD E4

Did your employer offer to change your job in any of these ways?

- 1 Yes
- 2 No



| are waiting to take up]. What is the name or title of this job?  
| INTERVIEWER: Job = A period of paid work with an employer or a period of  
| continuous self-employment.  
| If more than one job, main = the job with the most hours.  
| If equal hours: main = the highest paid job.  
| Write in.  
| String: 60  
|  
| END FILTER

*IF WPAaskD = 1*

| **WPJDO @**  
| What kind of work do most of the time?  
| IF RELEVANT: What materials / machinery use?  
| String: 80  
|  
| **WPQUAL @**  
| What skills or qualifications are needed to do this job?  
| WRITE IN  
| String: 120

| **WPSUP**  
| Do you directly supervise or are you directly responsible for the work of any other  
| people?  
| 1 Yes  
| 2 No  
|  
| END FILTER

*IF WPAaskE = 1*

| **WPEST**  
| [^Were you/are you/will you be]... READ OUT ...  
| 1 ... an employee,  
| 2 or, self-employed in your main job?

*IF Wpest = 1*

| **WPSAL**  
| Can I just check, are you paid either a salary or wage by an employer in your main  
| job?  
| 1 Yes  
| 2 No  
|  
| END FILTER

*IF Wpest = 2 OR Wpsal = 2*

| **WPCJB**  
| (Can I just check) [^were you/are you/will you be]...

INTERVIEWER: Read out each in turn and code all that apply (up to 4) ...

- 1 ... paid a salary or wage by an agency?
- 2 ... a sole Director of your own limited company?
- 3 ... running a business or professional practice?
- 4 ... a partner in a business or professional practice?
- 5 ... working for yourself?
- 6 ... a sub-contractor?
- 7 ... doing freelance work?
- 96 None of these

[code maximum 4 out of 8 possible responses]

**[Responses to WpCJb are recorded in variables WpCJ1-WpCJ96: each of these binary variables relates to one of the different binary response categories available]**

END FILTER

END FILTER

*Derivation of WpEs:*

*IF WpCJb = 1 THEN WpEs:= Employee*

*IF (WpCJb = 2) OR (WpCJb = 3) OR (WpCJb = 4) OR (WpCJb = 5) OR (WpCJb = 6) OR (WpCJb = 7) THEN WpEs:= SelfEmp*

*IF WpEst = Employ THEN WpEs:= Employee*

*IF WpEst = SEmploy THEN WpEs:= Selfemp*

*IF WpEst = DK THEN WpEs:= DK*

*IF WpEst = RF THEN WpEs:= RF*

*IF (WpStj = yes AND (WpEmp = Yes OR IFFW[PNum].WpEsd = DK OR IFFW[PNum].WpEsd = RF OR IFFW[PNum].WpEsd = Selfemp)) THEN WpEs:= IFFW[PNum].WpESd*

*IF WpEsp = RESPONSE THEN WpEs:= WpESP*

*IF WpEsp = DK THEN Wpes:= DK*

*IF WpEsp = RF THEN Wpes:= RF*

*IF WPAaskD = 1*

*IF WpEs = 1*

**WPMAKE\*@**

What does your employer make or do at the place where you work?

String: 100

**WPNEMP**

Including yourself, about how many people are employed at the place where you work?

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

END FILTER

*IF WpEs = 2*

**WPKAKS @**

What do you make or do in your business?

String: 100

**WPEMPL**

Do you have any employees?

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

END FILTER

END FILTER

*IF WPActW IN [paidw, tempaway] AND WpEs = Employee*

**WPNOE\***

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

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

END FILTER

*IF WPActW IN [paidw, tempaway]*

**WPJACT**

SHOW CARD E5

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

CODE ONE ONLY

- 1 Sedentary occupation: You spend most of your time sitting (such as in an office)
- 2 Standing occupation: You spend most of your time standing or walking. However the way you spend your time does not require intense physical effort (e.g. shop assistant, hairdresser, security guard etc.)
- 3 Physical work: This involves some physical effort including handling of heavy

objects and use of tools (e.g. plumber, cleaner, nurse, sports instructor, electrician, carpenter etc.)

4 Heavy manual work: This involves very vigorous physical activity including handling of very heavy objects (e.g. docker, miner, bricklayer, construction worker etc.)

*IF NOT (((QWPB.Qre[pnum].WpEmp = Yes) OR (IFFW.WpESd = DONTKNOW)) OR (IFFW.WpESd = REFUSAL)) OR (IFFW.WpESd = SelfEmp*

**WPSJOBY**

When did you start your current job?

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

ENTER YEAR AT THIS QUESTION

Range: 1900..2050

*IF WpsjobY = RESPONSE*

**WPSJOBM**

(When did you start your current job?)

CODE MONTH AT THIS QUESTION

IF DOESN'T KNOW MONTH, CODE SEASON

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

END FILTER

END FILTER

*IF IFFW[pnum].WpActw = nowork*

**WPWHYWK**

What were your reasons for starting working?

- 1 I needed the money
- 2 My own health improved

- 3 Health of relative/friend improved
- 4 For enjoyment/company at work
- 5 I was able to find a suitable job
- 95 Other reason

[code maximum 6 out of 6 possible responses]

**[Responses to WpWhyWk are recorded in variables WpWyW1-WpWyW95: each of these binary variables relates to one of the different binary response categories available]**

*IF (WpWhyWk = Other)*

**WPWHYWKX @**

What was this other reason?

String: 60

**[Open responses to WpWhyWkX are coded and merged with the multiple responses to WpWhyWk (recorded in WpWyW1 to WpWyW95). These merged responses are recorded in variables WpWym1-WpWym95]**

**WPWYM**

- 1 I needed the money
- 2 My own health improved
- 3 Health of relative/friend improved
- 4 For enjoyment/company at work
- 5 I was able to find a suitable job
- 6 Head-hunted/felt that I was wanted
- 7 I was bored and wanted a change
- 8 Finished studies
- 9 To help out a friend or relative
- 85 Other answer (not codeable 1-9)
- 86 Irrelevant response

END FILTER

END FILTER

*IF NOT ( (WpEmp = Yes) OR (IFFW.WpESd = DONTKNOW) OR (IFFW.WpESd = REFUSAL) OR (IFFW.WpESd = SelfEmp) )*

**WPWHYJB**

What were your reasons for taking this job?

CODE ALL THAT APPLY

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me
- 06 Started own business/become self-employed
- 07 Started work in family business
- 08 Was the only job I could get
- 09 Was the first job I found
- 95 Other

[code maximum 10 out of 10 possible responses]

**[Responses to WpWhyJb are recorded in variables WpWyJ1-WpWyJ95: each of these binary variables relates to one of the different binary response categories available]**

*IF (WpWhyJb = other)*

**WPWYJBX @**

What was this reason?

String: 60

**[Open responses to WpWyJbX are coded and merged with the multiple responses to WpWhyJb (recorded in WpWyJ1 to WpWyJ95). These merged responses are recorded in variables Wpyjm1-Wpyjm86]**

**WPYJM**

CODE ALL THAT APPLY

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me
- 06 Started own business/become self-employed
- 07 Started work in family business
- 08 Was the only job I could get
- 09 Was the first job I found
- 10 Local/nearer to home
- 11 Was the only job I could get
- 12 Better conditions of employment and better benefits
- 13 Company was taken over/departmental reorganisation
- 14 Was bored/wanted a change
- 15 Needed the money/to earn extra income on retirement
- 16 Was offered the job/was head-hunted
- 17 Was less physically demanding and stressful
- 18 To help out a friend/relative/institution
- 85 Other response (not codeable 1-18)
- 86 Irrelevant response

END FILTER

*IF WpWhyJb = RESPONSE*

*IF WpWhyJb.CARDINAL > 1*

**WPWHYJBM** [named wpwhyjm in the data]

What was your main reason for taking this job?

CODE ONE ONLY

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me

06 Started own business/become self-employed  
07 Started work in family business  
08 Was the only job I could get  
09 Was the first job I found  
95 Other

END FILTER

END FILTER

END FILTER

*IF WpEs = Employee*

**WPCJOB**

(Can I just check,) Is your current job ... READ OUT ...

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

**WPHJOB**

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

Range: 1..168

END FILTER

*IF WpEs = SelfEmp*

**WPHWRK**

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

Range: 1..168

END FILTER

END FILTER

*IF NOT (WPActW IN [paidw, tempaway]) AND ((((((Wpjob = Yes) OR Wpjob = DONTKNOW)) OR (Wpjob = REFUSAL)) OR Wpjob1 <> EMPTY) OR (Wpever = Yes)) OR (Wpever = DONTKNOW) OR (Wpever = REFUSAL))*

**WPWLY**

Have you done any regular paid work in last 12 months?

- 1 Yes
- 2 No

END FILTER

*IF (WPActW IN [paidw, tempaway]) OR (WpWly = Yes)*

| **WPWLYM**

| How many weeks were you [^in employment/actively self-employed] during the last 12 months?

| INTERVIEWER: Count each week respondent was in employment - even if only worked for part of the week.

| Range: 1..52

| **WPHLY**

| How many weeks leave did you take in the last 12 months?

| Range: 0..52

| END FILTER

| *IF WpWly = 1*

| **WPWLYY**

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

| Range: 0..999997

| *IF WpWlyy = DONTKNOW OR WpWlyy = REFUSAL*

| **WpWlyb**

| Did it amount to.....

| BRACKETS (5000, 10000, 20000, 50000)

| [Bracket results are recorded in **WpWlyyl**, **WpWlyyu**, **WpWlyye**, **WpWlyyr**]

| END FILTER

| END FILTER

| *IF (((Wpjob = Yes) OR (Wpjobl = Yes)) OR (Wpjobl = No)) OR (Wpever = Yes)*

| **WPLLSY**

| When did your last job start?

| INTERVIEWER: Job = A period of paid work with an employer or a period of continuous self-employment.

| Enter the year at this question.

| Range: 1900..2050

| *IF WpllsY = RESPONSE*

| **WPLLSM**

| (When did your last job start?)

| INTERVIEWER: Code the month at this question.

| If doesn't know month, code season.

| 01 January

| 02 February

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

END FILTER

**WPLLJY**

When did your last job end?

INTERVIEWER: Job = A period of paid work with an employer or a period of continuous self-employment.

Enter the year at this question.

Range: 1900..2050

*IF (WplljY = RESPONSE) AND (WplljY > 1990)*

**WPLLJM**

(When did your last job end?)

INTERVIEWER: Code the month at this question.

If doesn't know month, code season.

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

END FILTER

*IF NOT (WpDes IN [Retire, Semi])*

**WPYSTP**

SHOW CARD E6

What were reasons for stopping working?

CODE ALL THAT APPLY

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 95 Other reason

[code maximum 15 out of 15 possible responses]

**[Responses to WpYStp are recorded in variables WpYSt1-WpYSt95: each of these binary variables relates to one of the different binary response categories available]**

*IF (WpYStp = Other)*

**WPYSTPX @**

What was this reason?

String: 60

**[Open responses to WpYStpX are coded and merged with the multiple responses to WpYStp (recorded in WpYSt1 to WpYSt95). These merged responses are recorded in variables Wpysm1-Wpysm95]**

**WPYSM**

CODE ALL THAT APPLY

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance

- 14 Moved to a different area
- 15 Contract ran out
- 16 Reached retirement age
- 17 Wanted to study
- 85 Other response (not codeable 1-17)
- 86 Irrelevant response

END FILTER

*IF WpYStp = RESPONSE*

*IF WpYStp.CARDINAL > 1*

**WPYSTPM**

SHOW CARD E6

What was your main reason for stopping working?

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 95 Other reason

END FILTER

END FILTER

*IF (WpYStp = OwnIll) OR (((WpYStp = TooStres) AND (WplljY = RESPONSE)) AND (WplljY > 2000))*

*IF (WpEs = Employee) OR (WpEs = EMPTY AND (IFFW.WpESd = Employee))*

**WPNCHG**

SHOW CARD E4

If your work had been changed in any of these ways, would you have been able to continue working for that employer?

IF YES: Which of these changes would have enabled you to continue working for that employer?

CODE ALL THAT APPLY

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing

- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 96 None of these

[code maximum 7 out of 7 possible responses]

**[Responses to WpNChg are recorded in variables WpNCh1-WpNCh96: each of these binary variables relates to one of the different binary response categories available]**

*IF WpNChg= 96*

**WPNCHGN**

Would anything else have enabled you to stay with this employer?

- 1 Yes
- 2 No

END FILTER

*IF WpNChgN = Yes*

**WPNCHGX @**

What was this change?

String: 60

**[Open responses to WpNChgX are coded and merged with the multiple responses to WpNChg (recorded in WpNCh1 to WpNCh95). These merged responses are recorded in variables Wpncm1-Wpncm95]**

**WPNCM**

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 7 Change in working conditions/job responsibilities
- 85 Other response (not codeable 1-7)
- 86 Irrelevant response
- 95 None of these

END FILTER

*IF (WpNChg = RESPONSE) AND NOT ((WpNChg.CARDINAL = 1) AND (WpNChg = none))*

**WPNCHGO**

Did your employer offer to change your job in any of these ways?

- 1 Yes
- 2 No

*IF Did WpNChgO = No*

**WPNCHGA**

Did you ask your employer to change your job in any of these ways?

- 1 Yes
- 2 No

END FILTER

*IF (WpNChgO = Yes) OR (WpNChgA = Yes)*

**WPNCHGB**

In what ways did [<sup>^</sup>you ask your employer/your employer offer] to change your job?

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 95 Other

[code maximum 7 out of 7 possible responses]

**[Responses to WpNChgB are recorded in variables WpNCB1-WpNCB95: each of these binary variables relates to one of the different binary response categories available]**

*IF (WpNChgB = other)*

**WPNCHGBX @**

What is this other change?

String: 50

**[Open responses to WpNChgBX are coded and merged with the multiple responses to WpNChgB (recorded in WpNCB1 to WpNCB95). These merged responses are recorded in variables Wpnbm1-Wpnbm95]**

**WPNBM**

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 7 Change in working conditions or job responsibilities
- 85 Other response (not codeable 1-7)
- 86 Irrelevant response

END FILTER

END FILTER

END FILTER

```
|| | END FILTER
|| |
|| | END FILTER
|| |
|| | END FILTER
|| |
|| | END FILTER
```

```
IF (previously interviewed) AND (job mentioned last time is not most recent job) AND
(((date started last job reported) AND (date of last interview < date started last job)) OR
((not employed by same employer as at last interview) AND (reported when started
current job) AND (date of last interview < date started current job)))
[ IF (PrevDate[pnum] = RESPONSE) AND (Wpjob1 <> Yes) AND
(((WpplsY = RESPONSE) AND (WpplsM IN [January .. December]) AND
(PrevDate < (TODATE (WpplsY, WpplsM, 1)+ (0, 1, 0)))) OR (((WpEmp = No) AND
(WpsjobY = RESPONSE)) AND (WpsjobM IN
[January .. December])) AND (PrevDate < (TODATE (WpsjobY, WpsjobM,
1)+ (0, 1, 0)))) )
```

```
|| | LOOP FOR kk:= 1 TO 5 [LOOP for up to 5 previous jobs]
```

```
|| | IF (kk = 1) OR ((kk > 1) AND (((QStEnd[kk - 1].WpOWb = No) OR
|| | (QStEnd[kk - 1].WpOWb = DONTKNOW) OR (QStEnd[kk - 1].WpOWb =
|| | REFUSAL))) [kk = 1 OR kk > 1 AND QStEndkk - 1.WpOWb = No OR
|| | QStEndkk - 1.WpOWb = DONTKNOW OR QStEndkk - 1.WpOWb =
|| | REFUSAL]
```

**WPOJ**

Did have another job before this one?

- 1 Yes
- 2 No

IF WpOJ = 1

**WPOWB**

Were you working in this job at the time of the last interview?

IF ONLY WORKED IN THIS JOB BEFORE DATE OF LAST INTERVIEW ENTER 'NO'.

- 1 Yes
- 2 No

IF WpOWb = 2

**WPLPSY**

When did this job start?

INTERVIEWER: Job = A period of paid work with an employer or a period of continuous self-employment.

Enter the year at this question.

Range: 1900..2050

| | | | *IF WpLpsy = RESPONSE*

| | | | **WPLPSM**

| | | | (When did this job start?)

| | | | INTERVIEWER:Code the month at this question. If doesn't know month,  
code season.

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

| | | | END FILTER

| | | | END FILTER

| | | | **WPLPEY**

| | | | When did this job end?

| | | | INTERVIEWER:Job = A period of paid work with an employer or a period of  
continuous self-employment.

| | | | Enter the year at this question.

| | | | Range: 1900..2050

| | | | *IF WpLpey = RESPONSE]*

| | | | **WPLPEM**

| | | | (When did this job end?)

| | | | INTERVIEWER:Code the month at this question. If doesn't know month,  
code season.

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

11 November  
12 December  
13 Winter (start of year)  
14 Spring  
15 Summer  
16 Autumn  
17 Winter (end of year)

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF (ISex = male AND AgeP < 65) OR (ISex = female AND AgeP < 60)*

**WPNIC**

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

- 1 Yes
- 2 No

*IF WpNIC = 2 AND IFFW.WpNIC <> 1 AND IFFW.WpNICe <> 1*

**WPNICE**

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

- 1 Yes
- 2 No

END FILTER

END FILTER

*IF ISex = female AND NOT (Qld.QID1.Qre.DiMar IN [Single, Civil, SponSep, Spondiv, Sponwid]) AND IFFW.WpNImw <> RESPONSE*

**WPNIMW**

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

- 1 Yes
- 2 No

END FILTER

*IF WPActW IN [paidw, tempaway]*

*IF HeLWk = Yes*

**WPLIMWK**

You mentioned earlier that you have a health problem or disability that limits the kind or amount of paid work you can do, does this health problem or disability limit the kind or amount of work you can do in your current job?

- 1 Yes
- 2 No

*IF WpEs = Employee*

*IF WpLimWk = 2*

**WPCHGD\***

SHOW CARD E4

Has your employer changed your work in any of these ways to make it easier for you to continue working with your health problem or disability?

CODE ALL THAT APPLY

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 96 None of these

[code maximum 7 out of 7 possible responses]

**[Responses to WpChgD are recorded in variables WpChD1-WpChD96: each of these binary variables relates to one of the different binary response categories available]**

*IF WpChgD=96*

**WPCHGDN\***

Would anything else enable you to stay with this employer?

- 1 Yes
- 2 No

*IF WpChgDn = 1*

**WPCHGDX@**

What would this change be?

String: 60

**[Responses to wpchgdx are combined with multiple responses to wpchgD and recorded in binary variables wpcdm1-wpcdm96]**

**WPCDM**

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours

- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 7 Change in working conditions or job responsibilities
- 85 Other response (not codeable 1-7)
- 86 Irrelevant response
- 96 None of these

END FILTER

END FILTER

END FILTER

*IF WpLimWk = 1*

**WPCHGL**

SHOW CARD E4

Would you like the work that you do for your employer to change in any of these ways because of your health problem or disability?

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 95 SPONTANEOUS: Other change
- 96 None of these

[code maximum 8 out of 8 possible responses]

**[Responses to WpChgL are recorded in variables WpChL1-WpChL96: each of these binary variables relates to one of the different binary response categories available]**

*IF WpChgL = 95*

**WPCHGLX@**

What other changes?

String: 60

**[Responses to wpchglx are combined with multiple responses to wpchgl and recorded in binary variables wpclm1-wpclm96]**

**WPCLM**

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 85 Other response (not codeable 1-6)
- 86 Irrelevant response
- 96 None of these

```

| | | | END FILTER
| | | | IF WpChgL = RESPONSE
| | | | WPOCHG
| | | | SHOW CARD E4
| | | | Has your employer offered to change your job in any of these ways?
| | | | 1 Yes
| | | | 2 No
| | | | IF WpOChg = 2
| | | | WPACHG
| | | | SHOW CARD E4
| | | | Have you asked your employer to change your job in any of these ways?
| | | | 1 Yes
| | | | 2 No
| | | | END FILTER
| | | | IF (WpOChg = Yes) OR (WpAChg = Yes)
| | | | WPBCHG
| | | | SHOW CARD E4
| | | | In what ways did to change job?
| | | | 1 Less physically demanding
| | | | 2 Less mentally demanding/stressful
| | | | 3 Fewer hours/job sharing
| | | | 4 More flexible hours
| | | | 5 Working from home sometimes
| | | | 6 Special equipment/workplace adaptation
| | | | 95 Other
| | | | [code maximum 7 out of 7 possible responses]
| | | | [Responses to WpBChg are recorded in variables WpBCh1-
| | | | WpBCh96: each of these binary variables relates to one of the
| | | | different binary response categories available]
| | | | END FILTER
| | | | WPLNJ
| | | | Can I just check, are you currently looking for a new job?
| | | | 1 Yes
| | | | 2 No

```

| *IF WpInj = Yes*

| **WPWHYNJ**

| SHOW CARD E7

| What are the reasons for trying to leave your current job?

- | 01 Own ill health or disability
- | 02 Job too tiring/stressful
- | 03 Ill health or disability of a relative/friend
- | 04 Company going out of business/site closing down
- | 05 Being made redundant/dismissed/have no choice
- | 06 Taking voluntary redundancy
- | 07 To spend more time with partner/family
- | 08 Fed up with job and want a change
- | 09 Fed up with employer/colleagues and want a change
- | 10 To progress my career
- | 11 To earn more money
- | 12 Moving to a different area
- | 95 Other reason

| [code maximum 13 out of 13 possible responses]

| **[Responses to WpWhyNJ are recorded in variables WpWyN1-WpWyN95:  
each of these binary variables relates to one of the different binary  
response categories available]**

| *IF (EditQre = Yes) AND (WpWhyNJ = Other) [EditQre = 1 AND  
WpWhyNJ = 95]*

| END FILTER

| *IF (WpWhyNJ = Other)*

| **WPWYNJX @**

| What was this other reason?

| String: 60

| **[Responses to wpwynjx are combined with multiple responses to  
wpwhynj and recorded in variables wpynm1-wpynm86]**

| **WPYNM**

- | 01 Own ill health or disability
- | 02 Job too tiring/stressful
- | 03 Ill health or disability of a relative/friend
- | 04 Company going out of business/site closing down
- | 05 Being made redundant/dismissed/have no choice
- | 06 Taking voluntary redundancy
- | 07 To spend more time with partner/family
- | 08 Fed up with job and want a change
- | 09 Fed up with employer/colleagues and want a change
- | 10 To progress my career
- | 11 To earn more money
- | 12 Moving to a different area

- 13 Contract is running out/job was temporary
- 14 Company reorganisation/change in management
- 15 Not challenging or demanding enough
- 16 Looking for longer hours
- 17 Wants a job locally/nearer to home
- 18 Planning to move abroad
- 85 Other answer - not codeable 01-18
- 86 Irrelevant response

END FILTER

*IF (WpWhyNJ = RESPONSE) AND (WpWhyNJ.CARDINAL > 1)*

**WPMYNJ**

SHOW CARD E7

What is the main reason for trying to leave your current job?

- 01 Own ill health or disability
- 02 Job too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company going out of business/site closing down
- 05 Being made redundant/dismissed/have no choice
- 06 Taking voluntary redundancy
- 07 To spend more time with partner/family
- 08 Fed up with job and want a change
- 09 Fed up with employer/colleagues and want a change
- 10 To progress my career
- 11 To earn more money
- 12 Moving to a different area
- 95 Other reason

END FILTER

END FILTER

*IF (WpInj <> Yes) AND (WpLimWk <> Yes)*

**WPLKCH**

SHOW CARD E8

Would you like your current job to change in any of these ways?

IF YES: How would you like your job to change?

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 95 Other
- 96 None of these

[code maximum 8 out of 8 possible responses]

**[Responses to WpLkCh are recorded in variables WpLkC1-WpLkC96:  
each of these binary variables relates to one of the different binary**

**response categories available]**

*IF (WpLkCh = other)*

**WPLKCHX@**

What other changes?

String: 60

**[Responses to wplkchx are combined with multiple responses to wplkch and recorded in variables wplkm1-wplkm86]**

**WPLKM**

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace adaptation
- 7 Local/nearer to home
- 8 Higher salary
- 9 Have a new boss/change in management
- 10 Better employment conditions or benefits
- 11 More challenging/demanding job
- 12 Longer hours
- 13 No, would like to retire soon
- 85 Other response (not codeable 1-13)
- 86 Irrelevant response

END FILTER

*IF WpLkCh = RESPONSE*

**WPNOLK**

What are your reasons for staying in your current job?

- 1 Don't think could get another job that would suit me better
- 2 Too difficult/time-consuming to look for another job
- 3 Pay in current job
- 4 Will be retiring soon so not worth looking for another job
- 5 Pension scheme in current job
- 6 No other suitable jobs available in local area
- 95 Other reason

[code maximum 7 out of 7 possible responses]

**[Responses to WpNoLk are recorded in variables WpNLk1-WpNLk95: each of these binary variables relates to one of the different binary response categories available]**

*IF WpNoLk = 95*

**WPNOLKX@**

What is this reason?

String: 60

**[Responses to wpnolkx are combined with multiple responses to**

||| **wpnolk and recorded in variables wpnlm1-wpnlm86]**

||| **WPNLM**

- ||| 1 Don't think could get another job that would suit me better
- ||| 2 Too difficult/time-consuming to look for another job
- ||| 3 Pay in current job
- ||| 4 Will be retiring soon so not worth looking for another job
- ||| 5 Pension scheme in current job
- ||| 6 No other suitable jobs available in local area
- ||| 7 Enjoyment/like it/job satisfaction
- ||| 8 Commitment to own business/family business
- ||| 9 Keep mind active/exercise/get out of house
- ||| 10 Job is not too demanding or stressful
- ||| 11 Convenient location/nearer to home
- ||| 12 Financial security/good money
- ||| 13 Good employment conditions or benefits
- ||| 14 Suitable hours
- ||| 15 Being one's own boss/working for relative or friend/has a senior position
- ||| 16 Friends work there/gets on well with others
- ||| 17 Not staying/made redundant/retired
- ||| 85 Other response (not codeable 1-17)
- ||| 86 Irrelevant response

||| END FILTER

||| END FILTER

||| END FILTER

||| END FILTER

*IF (WpTaw = Sick) AND (WpEs = Employee)*

||| **WPSPAY**

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

- ||| 1 Yes
- ||| 2 No

||| END FILTER

*IF (WpEs = Employee) AND (WPActW IN [paidw, tempaway])*

||| **WPOTP**

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

||| INTERVIEWER: Code period covered.

- ||| 01 One week
- ||| 02 Two weeks
- ||| 03 Three weeks
- ||| 04 Four weeks

- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF Wpotp = RESPONSE*

**WPAOTP**

INTERVIEWER:Enter amount.

Round to nearest £.

Range: 0..9999997

END FILTER

*IF ((Wpotp = DONTKNOW) OR (Wpotp = REFUSAL)) OR ((WpAotp = DONTKNOW) OR (WpAotp = REFUSAL))*

*IF Wpotp = 1*

**WpAowb**

Is it.....

BRACKETS (200, 300, 500, 1500)

**[Bracket results are recorded in WpAotwl, WpAotwu, WpAotwe, WpAotwr]**

END FILTER

*IF Wpotp = 2*

**WpAofb**

Is it.....

BRACKETS (400, 600, 1000, 3000)

**[Bracket results are recorded in WpAotfl, WpAotfu, WpAotfe, WpAotfr]**

END FILTER

*IF Wpotp = 4, 5*

**WpAomb**

Is it.....

BRACKETS (800, 1200, 2000, 6000)

**[Bracket results are recorded in WpAotml, WpAotmu, WpAotme,**

**WpAotmr]**

END FILTER

IF Wpotp = 52, 95

**WpAoyb**

Is it.....

BRACKETS (10000, 15000, 25000, 75000)

**[Bracket results are recorded in WpAotyl, WpAoty, WpAotye,  
WpAotyr]**

END FILTER

IF Wptop <> [1, 2, 4, 5, 52, 95]

**WpAoob**

Is it.....

BRACKETS (800, 1200, 2000, 6000)

**[Bracket results are recorded in WpAotol, WpAotou, WpAotoe,  
WpAotor]**

END FILTER

END FILTER

END FILTER

**WPPERI**

Thinking about the last time [^you/he/she] [^were/was] paid, what period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

**WPSLIP**

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

INTERVIEWER: Ask or code.

- 1 Latest payslip consulted
- 2 Old payslip consulted
- 3 Payslip not consulted

4 No payslip provided by employer

*IF WpPeri = RESPONSE*

**WPTHP**

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

INTERVIEWER: Enter amount. Round to the nearest £.

Range: 0..9999997

END FILTER

*IF (Wpthp = DONTKNOW) OR (Wpthp = REFUSAL) OR (WpPeri = DONTKNOW) OR (WpPeri = REFUSAL*

*IF WpPeri = 1*

**WpthpWb**

Was it.....

BRACKETS (125, 200, 350, 1000)

**[Bracket results are recorded in Wpthpwl, Wpthpwu, Wpthpwe, Wpthpwr]**

END FILTER

*IF Thinking about the last time ^ = TwoWeek [WpPeri = 2]*

**Wpthpfb**

Was it.....

BRACKETS (250, 400, 700, 2000)

**[Bracket results are recorded in Wpthpfl, Wpthpfu, Wpthpfe, Wpthpfr]**

END FILTER

*IF WpPeri = 4, 5*

**Wpthpmb**

Was it.....

BRACKETS (500, 800, 1400, 4000)

**[Bracket results are recorded in Wpthpml, Wpthpmu, Wpthpme, Wpthpmr]**

END FILTER

*IF WpPeri = 52, 95*

**Wpthpyb**

Was it.....

BRACKETS (6000, 10000, 17500, 50000)

**[Bracket results are recorded in Wpthpyl, Wpthpyu, Wpthpye, Wpthpyr]**

END FILTER

*IF WpPeri <> [1, 2, 4, 5, 52, 95]*

**Wpthpob**

Was it.....

BRACKETS (500, 800, 1400, 4000)

**[Bracket results are recorded in Wpthpol, Wpthpou, Wpthpoe, Wpthpor]**

END FILTER

END FILTER

*IF Wpthp = RESPONSE*

**WPTHl**

Is this your usual take home pay?

1 Yes

2 No

*IF Wpthl = No*

**WPUP**

How much are you usually paid?

INTERVIEWER: Code period covered.

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two calendar months

08 Eight times a year

09 Nine times a year

10 Ten times a year

13 Three months/13 weeks

26 Six months/26 weeks

52 One year/12 months/52 weeks

90 Less than one week

95 One off/lump sum

96 None of these (EXPLAIN IN A NOTE)

*IF WpUP = RESPONSE*

**WPUPA**

INTERVIEWER:Enter amount.

Round to nearest £.

Range: 0..9999997

END FILTER

IF (WpUP = DONTKNOW) OR (WpUP = REFUSAL) OR (WpUPa = DONTKNOW) OR (WpUPa = REFUSAL)

IF WpUP = 1

**WpupaWb**

Would it be.....

BRACKETS (125, 200, 350, 1000)

**[Bracket results are recorded in Wpupawl, Wpupawu, Wpupawe, Wpupawr]**

END FILTER

IF WpUP = 2

**Wpupafb**

Would it be.....

BRACKETS (250, 400, 700, 2000)

**[Bracket results are recorded in Wpupafl, Wpupafu, Wpupafe, Wpupafr]**

END FILTER

IF WpUP = 4, 5

**Wpupamb**

Would it be.....

BRACKETS (500, 800, 1400, 4000)

**[Bracket results are recorded in Wpupaml, Wpupamu, Wpupame, Wpupamr]**

END FILTER

IF WpUP = 52, 95

**Wpupayb**

Would it be.....

BRACKETS (6000, 10000, 17500, 50000)

**[Bracket results are recorded in Wpupayl, Wpupayu, Wpupaye, Wpupayr]**

END FILTER

IF WpUP <> [1, 2, 4, 5, 52, 95]

**Wpupaob**

Would it be.....

BRACKETS (500, 800, 1400, 4000)

**[Bracket results are recorded in Wpupaol, Wpupaou, Wpupaoc, Wpupaor]**

|| | END FILTER

|| | END FILTER

|| | END FILTER

|| | END FILTER

**WPPAYA**

INTERVIEWER: How accurate do you think the answers given by the respondent to the questions about pay were?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

**WPCRET**

Is there a compulsory retirement age at current job? That is do you have to stop working when you reach a certain age?

- 1 Yes
- 2 No

*IF WPCRet = Yes*

**WPCRAGE**

What is the compulsory retirement age?

Range: 40..80

**WPCRETL**

Would like to work longer if employer would let ?

- 1 Yes
- 2 No

|| | END FILTER

|| | END FILTER

*IF (WPActW IN [paidw, tempaway]) AND (WpEs = SelfEmp*

**WPIR**

[^Do you prepare annual business accounts/In your business are annual business accounts prepared] for the Inland Revenue for tax purposes?

- 1 Yes
- 2 No
- 3 Not yet but will be

*IF WpIR = Yes*

**WPAP**

Are you working on your own account or are you in partnership with someone else?

- 1 Own account (sole owner)
- 2 In partnership

*IF Wpap = 2*

**WPYSH @**

The questions that follow are just about your own share of the business - that is not including your partner's share.

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

END FILTER

**WPRAIR**

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

INTERVIEWER: Enter the year at start of the period

Range: 1900..2050

*IF WpraiR = RESPONSE*

**WPRAIM**

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

INTERVIEWER: Code month at start of the period. If doesn't know month, code | | season.

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

END FILTER

**WPRAEY**

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

INTERVIEWER: Enter year at end of the period.

Range: 1900..2050

*IF WpraEY = RESPONSE*

**WPRAEM**

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

INTERVIEWER: Code month at end of the period. If doesn't know month, code season.

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

END FILTER

**WPPROF**

What was the amount of your share of the profit or loss figure shown on these accounts for this period?

Range: 0..999997

*IF (WpProf = DONTKNOW) OR (WpProf = REFUSAL)*

**WpProfb**

Was it.....

BRACKETS (5000, 10000, 20000, 60000)

**[Bracket results are recorded in WpProfI, WpProfu, WpProfe, WpProfr]**

END FILTER

**WPPL**

Does this amount refer to a profit or loss?

- 1 Profit/earnings
- 2 Loss

*IF WpPL = 1*

**WPBDT**

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

- 1 Yes (before tax)

- 2 No (after tax)
- 3 (SPONTANEOUS: Not liable for tax)

**WPBDNI**

And is that figure before deduction of National Insurance?

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

END FILTER

END FILTER

*IF WpIR = 2, 3*

**WPBI**

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

On average what was your weekly or monthly income from over the last 12 months, before deductions for any tax, national insurance or pension contributions?

INTERVIEWER: Code whether the amount will be given weekly or monthly.

- 1 Weekly
- 2 Monthly

*IF WpBI = 1*

**WPBIWA**

INTERVIEWER: Enter average weekly income over last 12 months.

Range: 0..999997

*IF (WpBIwa = DONTKNOW) OR (WpBIwa = REFUSAL)*

**WpBiwab**

Was it.....

BRACKETS (200, 400, 1000, 4000)

**[Bracket results are recorded in WpBiwal, WpBiwau, WpBiwae, WpBiwar]**

END FILTER

END FILTER

*IF WpBI = 2*

**WPBIMA**

INTERVIEWER: Enter average monthly income over last 12 months.

Range: 0..999997

END FILTER

*IF (WpBlma = DONTKNOW) OR (WpBlma = REFUSAL) OR (WpBI = DONTKNOW) OR (WpBI = REFUSAL)*

**WpBIMab**

Was it.....per month

BRACKETS (800, 1500, 4000, 15000)

**[Bracket results are recorded in WpBimal, WpBimau, WpBimae, WpBimar]**

END FILTER

END FILTER

*IF (WpCJb = SDirectr) OR (WpCJb = RunBuss) OR (WpCJb = BPartner)*

**WPBUSV**

About how much is the business worth?

Range: 0..99999997

*IF (WpbusV = DONTKNOW) OR (WpbusV = REFUSAL)*

**WpBusVB**

Is it.....

BRACKETS (25000, 100000, 250000, 1000000)

**[Bracket results are recorded in WpBusvl, WpBusvu, WpBusve, WpBusvr]**

END FILTER

END FILTER

END FILTER

**WPMOJ**

[^Can I just check, do/Do] you currently earn any money from [^work that you might do from time to time/other work that you might do apart from your main job]?

INTERVIEWER: Include paid babysitting, mail order agent, pools agent, etc.

1 Yes

2 No

*IF WpMoJ = Yes*

**WPHMSJ**

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

Range: 1..700

**WPESJ**

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

INTERVIEWER:Enter amount.

Round to the nearest £.

| Range: 0..9999997

| *IF (WpEsj = DONTKNOW) OR (WpEsj = REFUSAL)*

| **WpEsjB**

| Was it.....

| BRACKETS (250, 500, 1000, 2500)

| **[Bracket results are recorded in WpEsjl, WpEsju, WpEsje, WpEsjr]**

| END FILTER

| *IF (WpEsj = RESPONSE) AND (WpEsj = 0)*

| **WPESJM**

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

| ENTER AMOUNT.

| ROUND TO THE NEAREST £.

| Range: 0..9999997

| *IF (WpEsjm = DONTKNOW) OR (WpEsjm = REFUSAL)*

| **WpEsjmb**

| Was it.....

| BRACKETS (250, 500, 1000, 2500)

| **[Bracket results are recorded in WpEsjml, WpEsjmu, WpEsjme, WpEsjmr]**

| END FILTER

| END FILTER

| END FILTER

**WPBUS**

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

1 Yes

2 No

*IF WpBus = Yes*

| **WPVBUS**

| About how much is your share of the business worth?

| Range: 0..9999997

| *IF (WpVBus = DONTKNOW) OR (WpVBus = REFUSAL)*

| **WpVBusB**

| Is it.....

| BRACKETS (25000, 100000, 250000, 1000000)

| **[Bracket results are recorded in WpVBI, WpVBu, WpVBe, WpVBr]**

| |  
| END FILTER  
|  
END FILTER

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

| IF WpEs = Employee

| | **WPBPS**

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

- | | 1 Yes  
| | 2 No

| | IF WpBPS = Yes

| | | **WPPS**

| | | Are you a member of this pension scheme?

- | | | 1 Yes  
| | | 2 No

| | | END FILTER

| | END FILTER

| IF (WpBPS <> Yes) OR (WpPS <> Yes)

| | **WPMORE**

| | Apart from state pensions, do you have any pension schemes that you belong to now, or you had in the past?

| | Please include schemes which you are currently receiving an income from.

- | | 1 Yes  
| | 2 No

| | 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 mentioned in previous interview and any additional pensions indicated at Wpmore, Wpmorepc, Wpps or Wppspc**

*Derivation of WpBPStmp:*

*IF (NPffw = 0 OR NPffw <> RESPONSE) AND WpBPS = Yes THEN WpBPStmp := Yes  
IF (NPffw = 0 OR NPffw <> RESPONSE) AND WpBPS <> Yes THEN WpBPStmp := No*

*IF WpEs = SelfEmp THEN WpBPStmp := No  
ELSE WpBPStmp := EMPTY*

*IF pension not mentioned at last interview AND NOT pension mentioned at wpps*

**WPPENT**

What type of pension is this?

- 1 Employer Pension
- 2 Private Personal Pension
- 3 Group Personal Pension
- 4 Stakeholder Pension
- 5 S226 Plan
- 6 Retirement Annuity pensions (pre 86 PPPs)
- 95 Other retirement saving scheme

END FILTER

*IF pension mentioned at last interview [PPRevNew = 'Prev']*

**WPPREV**

Last time you were interviewed, in [^date of last interview], you told us about [^an employer pension/a private personal pension/a group personal pension/a stakeholder pension/a retirement annuity pension/an S226 plan/another retirement saving scheme] called [^pension name] [^BLANK/which you had stopped contributing to/which you were receiving an income from].

INTERVIEWER: Code 1 below unless respondent spontaneously disputes this record.

- 1 Yes
- 2 No
- 3 Not read out as didn't make sense

END FILTER

*IF (PPRevNew = 'New') OR (WpPrev = Yes AND WpFFName <> RESPONSE*

**WPNAME @**

Can I just check, what is the name of this pension scheme?

String: 80

END FILTER

*IF WpFFCurP <> Past AND NOT (pension mentioned at wpps)*

**WPCURR**

[^Do you currently contribute to this pension/Do you or your employer currently contribute to this pension/Are you currently contributing or could you still contribute to this pension]?

- 1 Yes
- 2 No

END FILTER

*IF (WpCurr = No) AND (PPRevNew = 'Prev')*

**WPLFTPS**

Why are you no longer a member of this pension scheme?

CODE ALL THAT APPLY.

*[The names in brackets denote the binary variable in the dataset recording responses to that code]*

- 1 I changed employer *[wplftpch]*
- 2 Employer no longer offers pension scheme *[wplftpof]*
- 3 No longer eligible to be a member of pension scheme *[wplftpel]*
- 4 Left as could not afford payments *[wplftpaf]*
- 5 Retired *[wplftpri]*
- 6 Started receiving pension *[wplftpri]*
- 95 Other reason *[wplftp95]*

*[code maximum 7 out of 7 possible responses]*

END FILTER

*IF (WpCurr <> Yes) OR ((WpFFCurP = RESPONSE) AND (WpFFCurP <> Current))*

**WPREC**

Are you [<sup>^</sup>still] receiving a pension from this scheme?

- 1 Yes
- 2 No

*IF WpRec = No*

**WPRGHX**

Have you ... READ OUT ...

- 1 ...retained pension rights in this scheme,
- 2 transferred rights from this scheme into another scheme,
- 3 or, received a lump sum refund of contributions?
- 4 [SPONTANEOUS: Has stopped receiving pension from this scheme]

END FILTER

END FILTER

*IF ((PrevNew = 'Prev') AND (WpFFPenT = EmpIPS)) AND (WpCurp = Current)*

**WPSRUL**

Have any of the pension scheme rules changed since we last interviewed you?

- 1 Yes
- 2 No
- 3 AFTER CAPI PROMPT: Yes, scheme rules have changed

END FILTER

*IF (WpPenT = EmpIPS) AND (WpCurr = Yes) AND ((PrevNew = 'New') OR ((WpFFDCDB <> RESPONSE) AND (WpCurp = Current)) OR (Wpsrul = Yes))*

| **WPDPS**

| SHOW CARD E13

| Is your pension scheme more like Type A or Type B?

| INTERVIEWER: Type A is sometimes called defined contribution or money purchase, type B is sometimes called defined benefit.

| 1 Type A: My pension contributions are put into a fund which grows over time and my pension will depend on the size of this fund when I retire

| 2 Type B: My pension will be based on a formula involving age, years of service and salary

| 3 Don't know

END FILTER

*IF WpCurr = Yes AND ((Wpsrul = 1 OR (WpPenT = EmpIPS AND (PrevNew = 'New' OR WpFFDCDB <> RESPONSE))) OR (WpPenT <> EmpIPS 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 (PrevNew = 'New' AND WpPenT = EmpIPS AND WpCurp = 2) 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: 0..120

END FILTER

| *IF Wpnra = 3, 2*

| **WPBTHP**

| What is the period of service?

| Range: 0..120

| 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

| 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: 0..120

| END FILTER

| *IF WpDCDB = DB*

| **WPDESP**

| SHOW CARD E14

| 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 (PrevNew = 'New' OR Wpsrul = 1 OR WpFFDCDB <> RESPONSE) AND WpDCDB = DB*

|| | **WPPLP**

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

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

|| | *IF 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 WpDCDB = DB*

|| | **WPLUMP**

|| | What size lump sum do you expect to receive when you retire?

|| | Range: 0..9999997

| *IF (WpLump = DONTKNOW) OR (WpLump = 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 when you retire?

| 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

| *IF WpPTP = 1*

| **WPPSAL**

| INTERVIEWER: Enter percentage of salary.

| Range: 1..100

| END FILTER

| *IF WpPTP = 2*

| **WPASAL**

| INTERVIEWER: Enter amount.

| Range: 0..999997

| END FILTER

| *IF WpAsal = NONRESPONSE OR WpPTP = 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 = Yes OR (PrevNew = 'New' AND WpCurp = Current) OR (WpFFYbs <> RESPONSE AND WpCurp = Current)*

| **WPYBS**

| How many years have you had this pension?

| Range: 0..60

| END FILTER

*IF WpPenT = EmpIPS AND WpCurp = Current AND WpEs = 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 = Amount*

**WPMCA**

INTERVIEWER: Enter amount.

Range: 0..9997

**WPPERC**

What period does this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

*IF WpMc = FracSal*

**WPMFRAC** [named wpmfrc in data]

INTERVIEWER: Enter percentage of salary.

Range: 0..100

END FILTER

END FILTER

*IF WpErc = 1*

*IF WpDCDB = 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

END FILTER

END FILTER

*IF WpDCDB = DC*

**WPMMIN**

Do you usually contribute more than the minimum contribution?

- 1 Yes
- 2 No

END FILTER

*IF WpAcon = 1 OR WpMMin = 1*

**WPACOA**

How much [^do you usually contribute through AVCs/are your usual additional contributions]?

INTERVIEWER: Code how answer is given.

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

*IF WpAcoA = 1*

**WPACOB**

INTERVIEWER: Enter amount.

Range: 0..99997

```

| | | | WPACOC
| | | | What period does this cover?
| | | | 01 One week
| | | | 02 Two weeks
| | | | 03 Three weeks
| | | | 04 Four weeks
| | | | 05 Calendar month
| | | | 07 Two calendar months
| | | | 08 Eight times a year
| | | | 09 Nine times a year
| | | | 10 Ten times a year
| | | | 13 Three months/13 weeks
| | | | 26 Six months/26 weeks
| | | | 52 One year/12 months/52 weeks
| | | | 90 Less than one week
| | | | 95 One off/lump sum
| | | | 96 None of these (EXPLAIN IN A NOTE)
| | | |
| | | | END FILTER
| | | |
| | | | IF WpAcoA = 2
| | | |
| | | | WPFRAS
| | | | INTERVIEWER: Enter percentage of salary.
| | | | Range: 0..100
| | | |
| | | | 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: 0..99997
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF WpErc = 2, 3 OR ((WpPenT = 2, 3, 4, 5, 6, 95) AND WpCurp = Current)
| | | |
| | | | WPPCONT [named wppcon in data]
| | | | Not including any National Insurance Contributions paid into the pension, do you
| | | | contribute to your pension ... READ OUT ...
| | | | 1 ... never,
| | | | 2 regularly,

```

- 3 irregularly,
- 4 or, have you stopped contributing to your scheme?

*IF WpPCont = 2*

**WPYCAMT** [named wpycat in data]

How much do you currently contribute to your pension scheme?

INTERVIEWER: Code how answer is given.

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

*IF WpYcAmt = 1*

**WPYCA**

INTERVIEWER: Enter amount.

Range: 0..99997

**WPMCAF**

What period does this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

*IF WpYcAmt = 2*

**WPYFRAC**

INTERVIEWER: Enter percentage of salary.

Range: 0..100

END FILTER

END FILTER

*IF WpPCont = 3, 4*

**WPLCOY**

When did you last make a contribution?  
INTERVIEWER: Enter year at this question.  
Range: 1900..2050

*IF (WpLcoY = RESPONSE) AND (WpLcoY >= year of last interview)*

**WPLCOM**

(When did you last make a contribution?)

INTERVIEWER: Code month at this question. If the respondent doesn't know month, code season.

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

END FILTER

*IF WpLcoY >= 2005*

**WPNIRR**

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

Range: 0..60

END FILTER

**WPMCON**

About how much did you contribute [^on that occasion/in the last 12 months]?

INTERVIEWER: Code how answer is given.

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

*IF WpMcon = 1*

**WPAC**

INTERVIEWER: Enter amount.

Range: 0..99997

END FILTER

*IF WpMcon = 2*

**WPFSC**

INTERVIEWER: Enter percentage of salary.

Range: 0..100

END FILTER

END FILTER

*IF WpPCont = 4*

**WPRCON**

Did you previously contribute regularly to this pension?

- 1 Yes
- 2 No

*IF WpRcon = Yes*

**WPRSC**

Why did you stop contributing to this Personal Pension?

CODE ALL THAT APPLY.

*[The names in brackets denote the binary variable in the dataset recording responses to that code]*

- 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]*
- 95 Other (specify) *[wprc95]*

*IF Wprsc = 95*

**WPRSCO @**

INTERVIEWER: Enter other reason.

String: 20

**[Open responses to Wprsc are coded and merged with the multiple responses to Wprsc in variable Wprcmmo-Wprcm86]**

**WPRM**

- 1 Moved job and joined employer's pension scheme *[wprcmmo]*
- 2 Rejoined employer's pension scheme in existing job *[wprcmre]*
- 3 Rejoined State Earnings Related Pension Scheme *[wprcmst]*
- 4 Worried about risks *[wprcmri]*
- 5 Worried about publicity concerning personal pensions *[wprcmpru]*
- 6 Because of own illness/disability *[wprcmoh]*
- 7 Stopped work/unemployed *[wprcmun]*
- 8 Could not afford it *[wprcmf]*

```

| | | 9 Changed jobs and not known whether joined new scheme [wprcmnk]
| | | 85 Other response (not codeable 1-9) [wprcm85]
| | | 86 Irrelevant response [wprcm86]
| | |
| | | END FILTER

```

*IF WpPenT <> S226P AND WpEs = Employee AND WpCurp = Current*

**WPCEMP**

Does your employer contribute to this pension?

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

*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: 0..99997

*IF WpAECP = RESPONSE*

**WPEPERI** [named wpeper in the data]

What period does that cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week

- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

END FILTER

*IF WpECPP = 2*

**WPFSEC**

INTERVIEWER: Enter percentage of salary.

Range: 0..100

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: 0..99997

*IF WpAMEC = RESPONSE*

**WPFSCP**

What period does that cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks

90 Less than one week

95 One off/lump sum

96 None of these (EXPLAIN IN A NOTE)

END FILTER

END FILTER

*IF WpMEC = 2, 3*

**WPFSCO**

INTERVIEWER: Enter percentage of salary or contribution.

Range: 0..100

END FILTER

END FILTER

END FILTER

*IF WpDCDB = DB AND WpCurp = Current*

**WPFSAV**

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

1 Yes

2 No

*IF WpFSav = 1*

**WPPFVAL** [named wppfva in the data]

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

Range: 0..9999997

*IF WpPFVal = DONTKNOW OR WpPFVal = 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 = Yes AND ((WpPenT = EmpIPS AND WpDCDB = DC) OR ((WpPenT = 2, 3, 4, 5, 6, 95) AND WpCurp = Current))*

**WPAPF**

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

Range: 0..9999997

*IF (WpAPF = DONTKNOW) OR (WpAPF = 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
| |
| | IF (WpPenB = DONTKNOW) OR (WpPenB = 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

```

*IF WpPenT = EmplPS AND WpCurp = Current AND WpFFCons <> 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 = EmpIPS AND PrevNew = 'New' AND WpCurp = Past) OR (WpFFPenT = EmpIPS AND WpCurp = Past AND WpFFDCDB <> RESPONSE)*

| **WPDSP**

| SHOW CARD E13

| Is your pension scheme more like Type A or Type B?

| INTERVIEWER: Type A is sometimes called defined contribution or money purchase, type B is sometimes called defined benefit.

- | 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
- | 2 Type B: My pension is based on a formula involving age, years of service and salary
- | 3 Don't know

| **WPERCP**

| 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 = Past*

| *IF PrevNew = 'New' AND WpRec = No*

| **WPDS**

| Between what dates (approximately) did you belong to this scheme?

| INTERVIEWER: Enter year started.

| Range: 1900..2050

**WPDE**

(Between what dates (approximately) did you belong to this scheme?)

INTERVIEWER: Enter year stopped.

Range: 1900..2050

END FILTER

*IF WpRec = Yes*

**WPINF**

Is the amount you receive from this pension continually adjusted to take account of inflation (sometimes called index-linked)?

1 Yes

2 No

**WPPAY**

Thinking about the last payment you received, what period did this cover?

01 One week

02 Two weeks

03 Three weeks

04 Four weeks

05 Calendar month

07 Two calendar months

08 Eight times a year

09 Nine times a year

10 Ten times a year

13 Three months/13 weeks

26 Six months/26 weeks

52 One year/12 months/52 weeks

90 Less than one week

95 One off/lump sum

96 None of these (EXPLAIN IN A NOTE)

*IF WpPay = RESPONSE*

**WPPYR**

How much did you receive?

Range: 0..999997

*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 Wppymf, 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)

*IF WpEs = Employee AND WpPenT = 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 = Yes AND (WpFFCurP <> Past OR WpFFRecP <> Receiving)*

**WPLUMPS** [named wplums in the data]

Many pensions allow you to take a lump sum in addition to your pension income. Have you received a lump sum from this scheme?

- 1 Yes
- 2 No

*IF WPLumpS = 1*

**WPLUMPA** [named wpluma in the data]

How much was the lump sum?

INTERVIEWER: Enter pounds.

Range: 1..999997

*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<>EmpIPS*

**WPTAKEP** [named wptakp in the data]

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?

*IF WPTakeP = 3*

**WPINCD**

How much have you withdrawn annually from your pension?



| | **WPBSPC** [named wpbpsp in the data]  
| | Does your current employer offer a pension scheme which you are entitled to  
| | join?

- | | 1 Yes
- | | 2 No

| | *IF WpBSPC = 1*

| | **WPPSPC**

| | Are you a member of this pension scheme?

- | | 1 Yes
- | | 2 No

| | END FILTER

| | END FILTER

| | *IF WpPSPC <> 1*

| | **WPMOREPC** [named wpmorp in the data]

| | 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 = Employee*

| | *IF WpBPS = 2*

| | **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
- | | 2 No

| | END FILTER

| | *IF WpPS = 2*

**WPPSM**

You said that you were not a member of the pension scheme your employer offers. Why aren't you a member of this scheme?

PROBE: What else?

CODE ALL THAT APPLY.

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

[code maximum 5 out of 5 possible responses]

**[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

**[Responses to Wppsmo are combined with multiple responses to Wppsm | | and recorded in binary variables Wppmm1-Wppmm86]**

**WPPMM**

- 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
- 85 Other response (not codeable 1-8)
- 86 Irrelevant response

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 DiMar IN [Remarr .. Sponnew]*

**WPEXW**

Some people who have been divorced or widowed receive pensions from schemes which their 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 = 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

END FILTER

END FILTER

END FILTER

*IF WpRPens > 0*

**MANINT @**

There may be a lot of uncertainty about how much income you will receive from your pension in the future, for example because of changes made by

your pension provider or changes to government pension policy. But many people still have some idea of the lowest and highest income they could possibly get.

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

#### **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

#### **WPMANPP**

INTERVIEWER: Code period at this question.

- 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..999997

*IF expected pension income range (WpMpah-WpMaIA) split into at least 2 ranges [WpQn >= 2]*

#### **WPMFQ**

SHOW CARD E9

What are the chances that you will receive more than £[^wp1q] per [^week/four weeks/month/year]?

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

| | END FILTER

| | IF *expected pension income range (WpMpah-WpMaIA) split into at least 3 ranges*

| | [WpQn >= 3]

| | **WPMSQ**

| | SHOW CARD E9

| | What are the chances that you will receive more than £[^wp2q] per [^week/four weeks/month/year]?

| | 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

| | END FILTER

| | IF *expected pension income range (WpMpah-WpMaIA) split into 4 ranges* [WpQn >= 4]

| | **WPMTQ**

| | SHOW CARD E9

| | What are the chances that you will receive more than £[^wp3q] per [^week/four weeks/month/year]?

| | 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

| | END FILTER

| | END FILTER

**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.

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

**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

**WPMANSP**

INTERVIEWER: Enter period at this question.

- 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..999997

*IF expected pension income range (WpMsah-WpMsh) split into at least 2 ranges [Wpsn >= 2]*

|

#### **WPMSFQ**

| SHOW CARD E9

| What are the chances that you will receive more than £[^wp1sq] per [^week/four weeks/month/year]?

| 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

|

END FILTER

*IF expected pension income range (WpMsah-WpMsh) split into at least 3 ranges [Wpsn >= 3]*

|

#### **WPMSSQ**

| SHOW CARD E9

| What are the chances that you will receive more than £[^wp2sq] per [^week/four weeks/month/year]?

| 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

|  
END FILTER

| *IF expected pension income range (WpMsah-WpMsh) split into 4 ranges [Wpsn >= 4]*

| **WPMSTQ**

| SHOW CARD E9

| What are the chances that you will receive more than £[^wp3sq] per [^week/four weeks/month/year]?

| 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

|  
END FILTER

| IF (ISex = male AND AgeP < 65) OR (ISex = female AND AgeP < 60)

| **WPSFOR**

| The government is planning to send all individuals a forecast of how much they can expect to receive from their state pension when they reach state pension age. It is also possible to request a forecast without waiting for the government to send one to you automatically.

| Have you ...READ OUT...

- | 1 Requested forecast but not yet received it?
- | 2 Requested a forecast and already received it?
- | 3 Received a forecast without requesting one?
- | 4 Neither received nor requested a forecast?

| *IF WpSFor = 2, 3*

| **WPPFDM**

| When did you receive your forecast?

| INTERVIEWER: Enter month.

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

| **WPPFDY**

| When did you receive your forecast?

| INTERVIEWER: Enter year.

| Range: 1990..2050

**WPFPR**

INTERVIEWER CODE: Does respondent have their State Pension forecast to refer to now?

- 1 Yes
- 2 No

*IF WpFPr = 2*

**WPFPN**

Can you remember (approximately) the figures that were in your State Pension forecast?

- 1 Yes
- 2 No

END FILTER

*IF (WpFPr = Yes) OR (WpFPN = Yes)*

**WPSPFU**

Did you understand the information provided on your State Pension forecast?

- 1 Yes
- 2 No

**WPBPPS**

How much Basic Pension does the forecast report that you can expect to receive per week if you retire at State Pension Age?

INTERVIEWER: If no figure given on the forecast, enter zero.

Enter amount.

**WPADDP**

Does the forecast state that you can expect to receive any 'Additional Pension'?

INTERVIEWER: Do not include any figure given for 'Graduated Retirement Benefit'.

- 1 Yes
- 2 No

*IF WpAddp = 1*

**WPAPS**

How much Additional Pension does the forecast report that you can expect to receive per week at State Pension Age?

INTERVIEWER: If no figure given on the forecast, enter zero.

Enter amount.

END FILTER

**WPPFEX**

SHOW CARD E10

|| | Compared to the amount you would have expected, which of the following describes the amounts stated in the forecast?

- || | 1 A lot lower than expected
- || | 2 A little lower than expected
- || | 3 About what expected
- || | 4 A little higher than expected
- || | 5 A lot higher than expected
- || | 6 Hadn't thought about it before

|| | END FILTER

|| | END FILTER

|| | *IF (ISex = female) AND (AgeP < 60)*

|| | **WPSPY**

|| | Do you know at what age in years and months you will reach the State Pension Age?

|| | INTERVIEWER: Enter number of years.

|| | Range: 50..120

|| | **WPSPAM**

|| | Do you know at what age in years and months that you will reach the State Pension age?

|| | INTERVIEWER: Enter number of months.

|| | Range: 0..11

|| | **WPSPA**

|| | Were you aware that the State Pension age for women is changing?

- || | 1 Yes
- || | 2 No

|| | END FILTER

|| | END FILTER

|| | *IF WpDes IN [Retire, Semi]*

|| | *IF IFFW[pnum].WpRAge <> RESPONSE*

|| | **WPRAGE**

|| | You said earlier that you were [^retired/semi-retired]. At what age did you retire?

|| | INTERVIEWER: Enter age here.

|| | Range: 0..120

|| | END FILTER

|| | END FILTER

|| | *IF (WpEs = Employee) AND ( WPActW IN [paidw, tempaway])*

|| |

**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

*IF WpEarly = 1*

**WPERAG**

How old were you?

INTERVIEWER: Enter age.

Range: 50..120

END FILTER

END FILTER

*IF WpDes IN [Retire, Semi]*

*IF IFFW[pnum].WpEret <> RESPONSE*

**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

*IF WpERet = Yes*

**WPERP**

When you first retired, did you retire on a ...READ OUT...

- 1 ... full pension,
- 2 reduced pension,
- 3 or, no pension?

**WPREAS**

SHOW CARD E11

What were your reasons for taking early retirement?

CODE ALL THAT APPLY.

- 01 Own ill health
- 02 Ill health of a relative/friend
- 03 Made redundant/dismissed/had no choice
- 04 Offered reasonable financial terms to retire early or take voluntary redundancy
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance

- 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]**

*IF (WpReas = 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]**

**WPREM**

- 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
- 85 Other response (not codeable 1-11)
- 86 Irrelevant response
- 97 SPONTANEOUS: Does not consider has retired early

END FILTER

*IF WpReas.CARDINAL > 1*

**WPMREA**

SHOW CARD E11

What was main reason for taking early retirement?

CODE ONE ONLY.

- 01 Own ill health
- 02 Ill health of a relative/friend
- 03 Made redundant/dismissed/had no choice
- 04 Offered reasonable financial terms to retire early or take voluntary redundancy
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner

- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these

END FILTER

END FILTER

END FILTER

*IF WpERet = No OR WpReas = 97 OR (WpERet <> RESPONSE) AND  
IFFW[pnum].WpEret <> RESPONSE AND IFFW[pnum].WpRRe <> RESPONSE)*

**WPRRE**

SHOW CARD E12

What were reasons for retiring?

CODE ALL THAT APPLY.

- 01 Reached retirement age
- 02 Own ill health
- 03 Ill health of a relative/friend
- 04 Made redundant/dismissed/had no choice
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 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]**

*IF (WpRRe = 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]**

**WPRRM**

- 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
- 12 Life event – (re)married/moved house/death of spouse
- 13 Could afford to
- 85 Other response (not codeable 1-13)
- 86 Irrelevant response
- 96 None of these

END FILTER

*IF WpRRRe.CARDINAL > 1*

**WPMRRE**

SHOW CARD E12

What was main reason for retiring?

CODE ONE ONLY

- 01 Reached retirement age
- 02 Own ill health
- 03 Ill health of a relative/friend
- 04 Made redundant/dismissed/had no choice
- 05 Could not find another job
- 06 To spend more time with partner/ family
- 07 To enjoy life while still young and fit enough
- 08 Fed up with job and wanted a change
- 09 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (specify)
- 96 None of these

END FILTER

*IF (WpRRRe = 1) AND NOT (WpRRRe = 4)*

**WPWKR**

Did have the opportunity to work past retirement age?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

**WPPHI**

Are you covered by private health insurance, whether in your own name or through another family member?

INTERVIEWER: Don't include dental or friendly plans. Include cover through ex-family members in code 2.

- 1 Yes, in own name
- 2 Yes, through another family member
- 3 No, not insured

*IF WpPHI = 1*

*IF ((WpEs = SelfEmp) AND (WPActW IN [paidw, tempaway])) OR NOT (WPActW IN [paidw, tempaway])*

**WPHOWU**

How is this Health Insurance paid for?

- 1 Paid for by self
- 2 Paid for by someone else

*IF WpHowU = 2*

**WPHLWHO @**

INTERVIEWER: Write in who pays for the insurance.

String: 40

**[Open responses to Wphlwho are coded and reported in wphlwz]**

**WPHLWZ**

- 1 Partner/Husband/Wife
- 2 Other family member
- 3 Company/Employer
- 4 Pension fund
- 85 Other answer - not codeable 01-04
- 86 Irrelevant response - not codeable 01-04

END FILTER

END FILTER

*IF (WpEs = Employee) AND (WPActW IN [paidw, tempaway])*

**WPHOWE**

How is this Health Insurance paid for?

- 1 Pays for all or part of it directly
- 2 Employer deducts it from wages
- 3 Employer pays it fully as a benefit

END FILTER

*IF (WpHowE = 1) OR (WpHowU = 1)*

**WPMHI**

How much do you pay per month for this insurance?

Please include the contribution for all family members covered by insurance in name.

```
| | INTERVIEWER: Write in amount.  
| | Range: 0..999997  
| |  
| | IF (WpMHI = DONTKNOW) OR (WpMHI = REFUSAL)  
| |  
| | WpMHib  
| | Is it.....  
| | BRACKETS (500, 1000, 2000, 5000)  
| | [Bracket results are recorded in WpMHil, WpMHiu, WpMHie, WpMHir]  
| |  
| | END FILTER  
| |  
| | END FILTER  
| |  
| | END FILTER
```

**WPX @**

INTERVIEWER: The Work and Pensions section is finished.  
Please enter 1 here to make the program store the current time and date.  
1 Press <1> and <Enter> to continue.

**INCOME AND ASSETS  
MODULE  
(IA)**

| | | IF (((((IndNo = 1) AND (AskIA[AllocP[1]] = Maybe)) AND (AskIA[AllocP  
| | | [2]] = Maybe)) OR ((AskIA[AllocP[1]] = Yes) OR (AskIA[AllocP[2]] = Yes))) OR  
| | | (((((InstType[1] = SpHSep) OR (InstType = Both1Sh)) OR (InstType = Both1Sep))  
| | | OR (InstType = Both2Sep)) OR (InstType = Single))) OR (((((InstType[2] =  
| | | SpHSep) OR (InstType = Both1Sh)) OR (InstType = Both1Sep)) OR (InstType =  
| | | Both2Sep)) OR (InstType = Single)) [IndNo = 1 AND AskIA = 3 AND AskIA = 3  
| | | OR AskIA = 1 OR AskIA = 1 OR InstType = 2 OR InstType = 3 OR InstType = 5  
| | | OR InstType = 6 OR InstType = 7 OR InstType = 2 OR InstType = 3 OR InstType  
| | | = 5 OR InstType = 6 OR InstType = 7]

| | | **IIANOW**

| | | INTERVIEWER: Do you wish to complete the Income and Assets Section now?

- | | | 1 Yes
- | | | 2 No

| | | END FILTER

| | | IF @/@/INTERVIEWER: Do you wish t = Yes [IIaNow = 1]

| | | IF ((IndNo = 1) AND (AskIA[AllocP[1]] = Maybe)) AND (AskIA[AllocP  
| | | [2]] = Maybe) [IndNo = 1 AND AskIA = 3 AND AskIA = 3]

| | | **IIAWHO**

| | | INTERVIEWER: Check ARF label for the number of the respondent who  
| | | answered the

| | | Income and Assets questions last time. Suggest to the respondent that the  
| | | same person

| | | answers HO this time.

| | | INTERVIEWER: Code who the questions on Income and Assets  
| | | will be addressed to.

- | | | 1
- | | | 2

| | | END FILTER

| | | **IIADAT**

| | | INTERVIEWER: Please enter the date of this section of the interview.

| | | **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 may receive. We may have asked some of the details earlier but it is important for us to check that we understand situation correctly.

INTERVIEWER: Press 1 and <Enter> .

- 1 Continue
- 2

### **IAWORK**

Did do any work for pay in the last year (that is since )?

ASK OR CODE.

- 1 Yes
- 2 No

*IF @/@/Did ^youorhw[pnum] do any = Yes [IAWork = 1]*

### **IASINC**

About how much wage and salary income did receive in the last year before taxes and other deductions?

Range: 0..999997

*IF (IaSInc = DONTKNOW) OR (IaSInc = REFUSAL) [IaSInc = DONTKNOW OR IaSInc = REFUSAL]*

### **IaSincB**

Was it.....

BRACKETS (10000, 20000, 35000, 100000)

[Bracket results are recorded in **IaSil**, **IaSiu**, **IaSie**, **IaSir**]

END FILTER

END FILTER

### **IASPEN**

Did receive any money from a state pension in the last year (that is since )?

INTERVIEWER: Include basic state pension and SERPS.

- 1 Yes
- 2 No

*IF ((IaSPen = Yes) AND (IAask = Yes)) AND NOT (IAIntro = Refuse)  
[IaSPen = 1 AND IAask = 1 AND NOT IAIIntro = 2]*

**IASPW**

Which of received the state pension in the last year?

- 1 Respondent only
- 2 Spouse / partner only
- 3 Both

END FILTER

IF ((IaSPen = Yes) AND (IAask <> Yes)) OR (IaSPW IN [respon, Both])  
 / / / / [IaSPen = 1 AND IAask <> 1 OR IaSPW = 1, 3]

**IASPA**

How much receive from the state pension?

INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

IF How much ^Idodoes[pnum] ^youna = RESPONSE [IasPa =  
 / / / / RESPONSE]

**IAPAM**

INTERVIEWER: Enter amount.

If the amount is not known because it is paid with benefits, enter the total amount received here.

Range: 0..99997

END FILTER

IF (((IasPa = DONTKNOW) OR (IasPa = REFUSAL)) OR (IaPAM =  
 / / / / DONTKNOW)) OR (IaPAM = REFUSAL) [IasPa = DONTKNOW OR IasPa  
 / / / / = REFUSAL OR IaPAM = DONTKNOW OR IaPAM = REFUSAL]

IF How much ^Idodoes[pnum] ^youna = OneWeek [IasPa = 1]



IF Computed: Respondent rec'd Sta <> Yes [IAW1SP <> 1]

**IAPLY**

Did start receiving this pension in the last year (that is since )?

- 1 Yes
- 2 No

IF Did ^youname[pnum] start recei = Yes [IaPly = 1]

**IAPLYW**

Which month did 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

END FILTER

END FILTER

END FILTER

IF Which of ^you\_them[pnum] recei IN [sparton, Both] [IaSPW = 2, 3]

**IASPP**

How much receive from the state pension?

INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks

- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF How much ^doesdid ^huswife[pnu = RESPONSE [laSPp = RESPONSE]*

**IAPPAM**

INTERVIEWER: Enter amount.

If the amount is not known because it is paid with benefits, enter the total amount received here.  
Range: 0..99997

END FILTER

*IF (((laSPp = DONTKNOW) OR (laSPp = REFUSAL)) OR (laPPAm = DONTKNOW)) OR (laPPAm = REFUSAL) [laSPp = DONTKNOW OR laSPp = REFUSAL OR laPPAm = DONTKNOW OR laPPAm = REFUSAL]*

*IF How much ^doesdid ^huswife[pnu = OneWeek [laSPp = 1]*

**laPPwB**

Is it.....

BRACKETS (50, 75, 100, 150)

[Bracket results are recorded in **laPPI, laPPu, laPPE, laPPr**]

ELSE

*IF How much ^doesdid ^huswife[pnu = TwoWeek [laSPp = 2]*

**laPPfB**

Is it.....

BRACKETS (100, 150, 200, 300)

[Bracket results are recorded in **laPPI, laPPu, laPPE, laPPr**]

ELSE

*IF How much ^doesdid ^huswife[pnu IN [Fourweek, OneMonth] [laSPp = 4, 5]*

**laPPmB**

Is it.....

BRACKETS (200, 300, 400, 600)

[Bracket results are recorded in **laPPI, laPPu, laPPE, laPPr**]

ELSE

*IF How much ^doesdid ^huswife[pnu IN [OneYear,*

```

| | | | | | | | | LumpSum] [laSPp = 52, 95]
| | | | | | | | |
| | | | | | | | | laPPyB
| | | | | | | | | Is it.....
| | | | | | | | | BRACKETS (2500, 4000, 5000, 7500)
| | | | | | | | | [Bracket results are recorded in laPPI, laPPu, laPPE, laPPr]
| | | | | | | | |
| | | | | | | | | ELSE
| | | | | | | | |
| | | | | | | | | laPPoB
| | | | | | | | | Is it.....
| | | | | | | | | BRACKETS (200, 300, 400, 600)
| | | | | | | | | [Bracket results are recorded in laPPI, laPPu, laPPE, laPPr]
| | | | | | | | |
| | | | | | | | | END FILTER
| | | | | | | | |
| | | | | | | | | END FILTER
| | | | | | | | |
| | | | | | | | | END FILTER
| | | | | | | | |
| | | | | | | | | END FILTER
| | | | | | | | |
| | | | | | | | | END FILTER
| | | | | | | | |
| | | | | | | | | IF Computed: Partner rec'd State <> Yes [IAW1SPP <> 1]
| | | | | | | | |
| | | | | | | | | IAPLYP
| | | | | | | | | Did start receiving this pension in the last year (that is since )?
| | | | | | | | | 1 Yes
| | | | | | | | | 2 No
| | | | | | | | |
| | | | | | | | | IF Did ^huswife[pnum] start recei = Yes [laPlyp = 1]
| | | | | | | | |
| | | | | | | | | IAPLW
| | | | | | | | | Which month did 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
| | | | | | | | |
| | | | | | | | | END FILTER
| | | | | | | | |
| | | | | | | | | END FILTER

```

END FILTER

**IAPPEN**

Did receive any money from a personal or employer pension in the last year (that is since )?

- 1 Yes
- 2 No

*IF Did ^youorhw[pnum] receive any = Yes [IAPPen = 1]*

**IAPPEI**

About how much income did receive in the last year from personal or employer pensions before taxes and other deductions?

INTERVIEWER: Do not include any lump sums received.  
Range: 0..999997

END FILTER

*IF (IAPPEI = DONTKNOW) OR (IAPPEI = REFUSAL) [IAPPEI = DONTKNOW OR IAPPEI = REFUSAL]*

**IAPPEiB**

Was it.....

BRACKETS (1500, 4000, 8000, 30000)

[Bracket results are recorded in **IAPPI**, **IAPPu**, **IAPPe**, **IAPPr**]

END FILTER

**IAANIN**

Apart from any pension annuity income and anything else you have already told me about, did receive any annuity income in the last year (that is since )?

Annuity income is when you make a lump sum payment to a financial institution and in return they give you a regular income for the rest of your life.

- 1 Yes
- 2 No

*IF ((IAnIn = Yes) AND (IAask = Yes)) AND NOT (IAIntro = Refuse)*  
*[IAnIn = 1 AND IAask = 1 AND NOT IANtro = 2]*

**IAAILY**

Which of received annuity income in the last year?

- 1 Respondent only
- 2 Spouse/partner only
- 3 Both

END FILTER

IF (laAlly IN [RespOn, Both]) OR ((laAnIn = Yes) AND (IAask <> Yes))  
[laAlly = 1, 3 OR laAnIn = 1 AND IAask <> 1]

**IAAIM**

How much annuity income did receive in the last year after tax?  
Range: 0..999997

IF (laAIM = DONTKNOW) OR (laAIM = REFUSAL) [laAIM =  
DONTKNOW OR laAIM = REFUSAL]

**laAimb**

Was it.....

BRACKETS (400, 1000, 2000, 15000)

[Bracket results are recorded in **laAil, laAiu, laAie, laAir**]

END FILTER

END FILTER

IF Which of ^youthem[PNum] receiv IN [SPartnOn, Both] [laAlly = 2, 3]  
/ / / /

**IAAIP**

How much annuity income did receive in the last year after tax?  
Range: 0..999997

IF (laAIP = DONTKNOW) OR (laAIP = REFUSAL) [laAIP =  
DONTKNOW OR laAIP = REFUSAL]

**laAipb**

Was it.....

BRACKETS (400, 1000, 2000, 15000)

[Bracket results are recorded in **laAil, laAiu, laAie, laAir**]

END FILTER

END FILTER

**IAHDB**

SHOW CARD F1

Did receive any of these health or disability benefits in the last year (that is  
since )?

INTERVIEWER: Include any currently receiving.

1 Yes

2 No

IF SHOW CARD F1 @/Did ^youorhw[pn = Yes [lahdb = 1]

**IAHDR**

SHOW CARD F1

Which of these health or disability benefits received in the last year?

INTERVIEWER: Include any currently receiving.

PROBE: What others?

CODE ALL

THAT APPLY.

If respondent asks about Disabled Persons Tax Credit or Disability

Working Allowance, explain that this benefit was abolished in April 2003 and became part of

the Working Tax Credit.

01 Incapacity Benefit previously Invalidity Benefit

02 Severe Disablement Allowance SDA

03 Statutory sick pay SSP

04 Attendance Allowance

05 Disability Living Allowance

06 Industrial Injuries Disablement Benefit

07 War Disablement Pension or War Widow's Pension

08 Carer's Allowance

95 Some other benefit for people with disabilities (SPECIFY)

96 None of these

[code maximum 9 out of 10 possible responses]

*IF (EditQre = Yes) AND (lahdR = Other) [EditQre = 1 AND lahdR = 95]*

**IAHDRZ**

EDITOR : Back code here - CODE FRAME 29

Which of these health or disability benefits received in the last year?

INTERVIEWER: Include any currently receiving.

CODE ALL THAT APPLY

01 Incapacity Benefit (previously Invalidity Benefit)

02 Severe Disablement Allowance (SDA)

03 Statutory sick pay (SSP)

04 Attendance Allowance

05 Disability Living Allowance

06 Industrial Injuries Disablement Benefit

07 War Disablement Pension or War Widow's Pension

08 Carer's Allowance

85 Other answer - not codeable 01-08, or 96

86 Irrelevant response - not codeable 01-08, or 96

95 Other

96 None of these

[code maximum 10 out of 12 possible responses]

END FILTER

```
| | | | IF (lahdR = Other) AND ((EditQre <> Yes) OR (lahdRZ = EMPTY OR
| | | | (lahdRZ = Other))) [lahdR = 95 AND EditQre <> 1 OR lahdRZ = EMPTY
| | | | OR lahdRZ = 95]
```

**IAHDRO**

INTERVIEWER: Enter the name of the other benefit.  
String: 40

END FILTER

```
| | | | IF (lahdR = RESPONSE) AND NOT (lahdR = None) [lahdR =
| | | | RESPONSE AND NOT lahdR = 96]
```

**IAHDN**

SHOW CARD F1

Which of these health or disability benefits receiving at the moment?  
PROBE: What others?  
CODE ALL THAT APPLY

If respondent asks about Disabled Persons Tax Credit or Disability  
Working Allowance, explain that this benefit was abolished in April 2003  
and became part of the Working Tax Credit.

- 01 Incapacity Benefit previously Invalidity Benefit
- 02 Severe Disablement Allowance SDA
- 03 Statutory sick pay SSP
- 04 Attendance Allowance
- 05 Disability Living Allowance
- 06 Industrial Injuries Disablement Benefit
- 07 War Disablement Pension or War Widow's Pension
- 08 Carer's Allowance
- 95 Some other benefit for people with disabilities (SPECIFY)
- 96 None of these

[code maximum 9 out of 10 possible responses]

END FILTER

```
| | | | IF (lahdN = RESPONSE) AND NOT (lahdN = None) [lahdN =
| | | | RESPONSE AND NOT lahdN = 96]
```

LOOP FOR bloop:= 1 TO 9

**IAP**

How much did receive from

INTERVIEWER: Code period covered.

- 01 One week





IF Did ^ytxt start receiving this = Yes [IALY = 1]

**IALM**

Which month did 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

IF laLM.ORD = Qlnit.IntDat.MONTH [laLM.ORD =  
Qlnit.IntDat.MONTH]

**IAWHMTH**

Is that this year or last year?

- 1 This year
- 2 Last year

END FILTER

END FILTER

END FILTER

IF NOT (laT IN [1, 3, 5, 7]) [NOT laT = 1, 3, 5, 7]

**IAB**

For how many weeks or months in the last year, that is since , did  
receive ?

- 1 Answer given in weeks
- 2 Answer given in months

IF For how many weeks or months i = Weeks [laB = 1]

**IABW**

INTERVIEWER: Enter number of weeks.

Range: 0..52

END FILTER

IF For how many weeks or months i = Months [laB = 2]

**IABM**









INTERVIEWER: Include any currently receiving.  
PROBE: What others?  
CODE ALL  
THAT APPLY  
If respondent asks about Disabled Persons Tax Credit or Disability  
Working Allowance, explain that this benefit was abolished in April 2003 and  
became part

of the Working Tax Credit.  
01 Incapacity Benefit previously Invalidation Benefit  
02 Severe Disablement Allowance SDA  
03 Statutory sick pay SSP  
04 Attendance Allowance  
05 Disability Living Allowance  
06 Industrial Injuries Disablement Benefit  
07 War Disablement Pension or War Widow's Pension  
08 Carer's Allowance  
95 Some other benefit for people with disabilities (SPECIFY)  
96 None of these  
[code maximum 9 out of 10 possible responses]

*IF (EditQre = Yes) AND (lahdp = Other) [EditQre = 1 AND lahdz =  
95]*

**IAHDPZ**

EDITOR : Back code here - CODE FRAME 30  
Which, if any, of these health or disability benefits has received in the  
last year?

INTERVIEWER: Include any currently receiving.  
CODE ALL THAT APPLY  
01 Incapacity Benefit (previously Invalidation Benefit)  
02 Severe Disablement Allowance (SDA)  
03 Statutory sick pay (SSP)  
04 Attendance Allowance  
05 Disability Living Allowance  
06 Industrial Injuries Disablement Benefit  
07 War Disablement Pension or War Widow's Pension  
08 Carer's Allowance  
85 Other answer - not codeable 01 to 08, or 96  
86 Irrelevant response - not codeable 01 to 08, or 96  
95 Other  
96 None of these  
[code maximum 12 out of 12 possible responses]

END FILTER

*IF (lahdp = Other) AND ((EditQre <> Yes) OR (lahdpz = EMPTY OR  
(lahdpz = Other))) [lahdp = 95 AND EditQre <> 1 OR lahdz = EMPTY  
OR lahdz = 95]*













2 No

END FILTER

END FILTER

*IF Did ^ytxt start receiving this = Yes [IALY = 1]*

**IALM**

Which month did 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

*IF laLM.ORD = QInit.IntDat.MONTH [laLM.ORD = QInit.IntDat.MONTH]*

**IAWHMTH**

Is that this year or last year?

- 1 This year
- 2 Last year

END FILTER

END FILTER

END FILTER

*IF NOT (laT IN [1, 3, 5, 7]) [NOT laT = 1, 3, 5, 7]*

**IAB**

For how many weeks or months in the last year, that is since , did receive ?

- 1 Answer given in weeks
- 2 Answer given in months

*IF For how many weeks or months i = Weeks [laB = 1]*

**IABW**

INTERVIEWER: Enter number of weeks.

Range: 0..52



```

| | | | | 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
| | | | | [code maximum 9 out of 10 possible responses]
| | | | |
| | | | | IF (IAgeOf >= 60) AND (IIADat < MIGEnd) [IAgeOf >= 60 AND
| | | | | IIADat < MIGEnd]
| | | | |
| | | | | IF EditQre <> Yes [EditQre <> 1]
| | | | |
| | | | | IF (IaBeR = InSupp) AND NOT (IaBeR = PensTC) [IaBeR = 1 AND
| | | | | NOT IaBeR = 2]
| | | | |
| | | | | XIABER
| | | | | On 1st October 2003 the Minimum Income Guarantee (Income
| | | | | Support for the over 60's) was replaced by a new, but similar benefit
| | | | | called the Pension Credit.
| | | | | Can I just check, ever receive the Pension Credit?
| | | | |
| | | | | INTERVIEWER: If the respondent answers yes, please go back and
| | | | | press <Ins> to
| | | | | add code 2 (for Pension Credit) at the previous question.
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF NOT (IaBeR = InSupp) AND (IaBeR = PensTC) [NOT IaBeR =
| | | | | 1 AND IaBeR = 2]
| | | | |
| | | | | YIABER
| | | | | On 1st October 2003 the Pension Credit replaced the Minimum
| | | | | Income Guarantee (Income Support for the over 60's).
| | | | | Can I just check, receiving the Minimum Income Guarantee at
| | | | | any time in the last year?
| | | | |
| | | | | INTERVIEWER: If the respondent answers yes, please go back and
| | | | | press <Ins>
| | | | | to add code 1 (for MIG) at the previous question.
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF (IaBeR = InSupp) AND (IaBeR = PensTC) [IaBeR = 1 AND

```

| | | | | | | | | | *laBeR = 2]*

| | | | | | | | | | **ZIABER**

| | | | | | | | | | On 1st October 2003, Minimum Income Guarantee (or Income Support for the over 60's) was replaced by a new, but similar benefit called the Pension Credit.

| | | | | | | | | | The Pension Credit is more generous than the Minimum Income Guarantee for some people so we are interested in the amount that received under the new system and the old system so we will ask you questions about both benefits.

| | | | | | | | | | INTERVIEWER: Press 1 and <Enter> to continue.

| | | | | | | | | | Range: 1..1

| | | | | | | | | | END FILTER

| | | | | | | | | | END FILTER

| | | | | | | | | | END FILTER

| | | | | | | | | | END FILTER

| | | | | | | | | | END FILTER

| | | | | | | | | | *IF (EditQre = Yes) AND (laBeR = Other) [EditQre = 1 AND laBeR =*

| | | | | | | | | | *95]*

| | | | | | | | | | **IABERZ**

| | | | | | | | | | EDITOR : Back code here - CODE FRAME 31

| | | | | | | | | | Which of these benefits received in the last year?

| | | | | | | | | | INTERVIEWER: Include any currently receiving.

| | | | | | | | | | CODE ALL THAT APPLY.

| | | | | | | | | | 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

| | | | | | | | | | 51 Other - 50+ employment credit

| | | | | | | | | | 85 Other answer - not codeable 01 to 08, 51, or 96

| | | | | | | | | | 86 Irrelevant response - not codeable 01 to 08, 51, or 96

| | | | | | | | | | 95 Other

| | | | | | | | | | 96 None of these

| | | | | | | | | | [code maximum 13 out of 13 possible responses]

END FILTER

*IF (IaBeR = Other) AND ((EditQre <> Yes) OR (IaBeRz = EMPTY OR  
/ / / / (IaBeRz = Other))) [IaBeR = 95 AND EditQre <> 1 OR IaBeRz = EMPTY OR  
/ / / / IaBeRz = 95]*

**IABERO**

INTERVIEWER: Enter the name of the other benefit.  
String: 40

END FILTER

*IF (IaBeR = RESPONSE) AND NOT (IaBeR = None) [IaBeR =  
/ / / / RESPONSE AND NOT IaBeR = 96]*

**IABEN**

SHOW CARD F2

Which of these benefits receiving at the moment?

PROBE: What others? CODE ALL THAT APPLY.

- 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

[code maximum 9 out of 10 possible responses]

END FILTER

*IF (IaBeN = RESPONSE) AND NOT (IaBeN = None) [IaBeN =  
/ / / / RESPONSE AND NOT IaBeN = 96]*

LOOP FOR bloop:= 1 TO 9

**IAP**

How much did receive from

INTERVIEWER: Code period covered.

- 01 One week





*IF Did ^ytxt start receiving this = Yes [IALY = 1]*

**IALM**

Which month did 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

*IF laLM.ORD = Qlnit.IntDat.MONTH [laLM.ORD = Qlnit.IntDat.MONTH]*

**IAWHMTH**

Is that this year or last year?

- 1 This year
- 2 Last year

END FILTER

END FILTER

END FILTER

*IF NOT (laT IN [1, 3, 5, 7]) [NOT laT = 1, 3, 5, 7]*

**IAB**

For how many weeks or months in the last year, that is since , did receive ?

- 1 Answer given in weeks
- 2 Answer given in months

*IF For how many weeks or months i = Weeks [laB = 1]*

**IABW**

INTERVIEWER: Enter number of weeks.

Range: 0..52

END FILTER

*IF For how many weeks or months i = Months [laB = 2]*

**IABM**







```

| | | | | 2 Last year
| | | | | END FILTER
| | | | | END FILTER
| | | | | END FILTER
| | | | | IF NOT (IaT IN [1, 3, 5, 7]) [NOT IaT = 1, 3, 5, 7]
| | | | | IAB
| | | | | For how many weeks or months in the last year, that is since , did
| | | | | receive ?
| | | | | 1 Answer given in weeks
| | | | | 2 Answer given in months
| | | | | IF For how many weeks or months i = Weeks [IaB = 1]
| | | | | IABW
| | | | | INTERVIEWER: Enter number of weeks.
| | | | | Range: 0..52
| | | | | END FILTER
| | | | | IF For how many weeks or months i = Months [IaB = 2]
| | | | | IABM
| | | | | INTERVIEWER: Enter number of months.
| | | | | Range: 1..12
| | | | | END FILTER
| | | | | IF (Qiaa.IAask = Yes) AND (Qiaa.IAIntro = Continue) [Qiaa
| | | | | [PNum].IAask = Yes AND Qiaa[PNum].IAIntro = Continue]
| | | | | IABEP
| | | | | SHOW CARD F2
| | | | | Which, if any, of these benefits receive in the last year?
| | | | | INTERVIEWER: Include any currently receiving. PROBE: What others?

```

CODE ALL THAT

- APPLY.
- 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
- [code maximum 9 out of 10 possible responses]

*IF (((IAgePart[PNum] >= 60) AND (IDeadP12M[PNum] <> Yes)) OR ((IAgeAtDeath >= 60) AND (IDeadPDat[PNum] > Oct2003))) AND (IADat < MIGEnd) [IAgePart >= 60 AND IDeadP12M <> Yes OR IAgeAtDeath[PNum] >= 60 AND IDeadPDat > Oct2003 AND IADat < MIGEnd]*

*IF (IaBeP = InSupp) AND NOT (IaBeP = PensTC) [IaBeP = 1 AND NOT IaBeP = 2]*

**XIABER**

On 1st October 2003 the Minimum Income Guarantee (Income Support for the over 60's) was replaced by a new, but similar benefit called the Pension Credit.

Can I just check, ever receive the Pension Credit?

INTERVIEWER: If the respondent answers yes, please go back and press <Ins> to

add code 2 (for Pension Credit) at the previous question.

- 1 Yes
- 2 No

ELSE

*IF NOT (IaBeP = InSupp) AND (IaBeP = PensTC) [NOT IaBeP = 1 AND IaBeP = 2]*

**YIABER**

On 1st October 2003 the Pension Credit replaced the Minimum Income Guarantee (Income Support for the over 60's).

Can I just check, receiving the Minimum Income Guarantee at any time in the last year?

INTERVIEWER: If the respondent answers yes, please go back and

press <Ins>

to add code 1 (for MIG) at the previous question.

- 1 Yes
- 2 No

ELSE

*IF (IaBeP = InSupp) AND (IaBeP = PensTC) [IaBeP = 1 AND  
IaBeP = 2]*

**ZIABER**

On 1st October 2003, Minimum Income Guarantee (or Income Support for the over 60's) was replaced by a new, but similar benefit called the Pension Credit.

The Pension Credit is more generous than the Minimum Income Guarantee for some people so we are interested in the amount that received under the new system and the old system so we will ask you questions about both benefits.

INTERVIEWER: Press 1 and <Enter> to continue.

Range: 1..1

END FILTER

END FILTER

END FILTER

END FILTER

*IF (EditQre = Yes) AND (IaBeP = Other) [EditQre = 1 AND IaBeP =  
95]*

**IABEPZ**

EDITOR : Back code here - CODE FRAME 32

SHOW CARD F2

Which, if any, of these benefits has received in the last year?

INCLUDE ANY CURRENTLY RECEIVING

PROBE: What others?

CODE ALL THAT APPLY.

- 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  
51 Other - 50+ employment credit  
85 Other answer - not codeable 01 to 08, 51, or 96  
86 Irrelevant response - not codeable 01 to 08, 51, or 96  
95 Some other State Benefit (SPECIFY)  
96 None of these  
[code maximum 13 out of 13 possible responses]

END FILTER

*IF (laBeP = Other) AND ((EditQre <> Yes) OR (laBePz = EMPTY OR  
/ / / / / (laBePz = Other))) [laBeP = 95 AND EditQre <> 1 OR laBePz = EMPTY  
/ / / / / OR laBePz = 95]*

**IABEPO**

INTERVIEWER: Enter the name of the other benefit.  
String: 40

END FILTER

*IF (laBeP = RESPONSE) AND NOT (laBeP = None) [laBeP =  
/ / / / / RESPONSE AND NOT laBeP = 96]*

LOOP FOR bloop:= 1 TO 9

**IAP**

How much did receive from

INTERVIEWER: Code period covered.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF How much did ^ytxt ^usually re = RESPONSE [laP =*





09 September  
10 October  
11 November  
12 December  
  
*IF laLM.ORD = QInit.IntDat.MONTH [laLM.ORD =  
QInit.IntDat.MONTH]*

**IAWHMTH**

Is that this year or last year?  
1 This year  
2 Last year

END FILTER

END FILTER

END FILTER

*IF NOT (laT IN [1, 3, 5, 7]) [NOT laT = 1, 3, 5, 7]*

**IAB**

For how many weeks or months in the last year, that is since ,  
did receive ?

- 1 Answer given in weeks
- 2 Answer given in months

*IF For how many weeks or months i = Weeks [laB = 1]*

**IABW**

INTERVIEWER: Enter number of weeks.  
Range: 0..52

END FILTER

*IF For how many weeks or months i = Months [laB = 2]*

**IABM**

INTERVIEWER: Enter number of months.  
Range: 1..12

END FILTER

END FILTER

END FILTER

END FILTER

```

| | | | | END FILTER
| | | | |
| | | | | IF (IaBeP = RESPONSE) AND (IaBePn = RESPONSE) [IaBeP =
| | | | | RESPONSE AND IaBePn = RESPONSE]
| | | | |
| | | | | LOOP FOR bloop:= 1 TO 9
| | | | |
| | | | | IF (IaBeP = b95loop) AND NOT (IaBePn = b95loop) [IaBeP =
| | | | | b95loop AND NOT IaBePn = b95loop]
| | | | |
| | | | | IAP
| | | | | How much did receive from
| | | | |
| | | | | INTERVIEWER: Code period covered.
| | | | | 01 One week
| | | | | 02 Two weeks
| | | | | 03 Three weeks
| | | | | 04 Four weeks
| | | | | 05 Calendar month
| | | | | 07 Two calendar months
| | | | | 08 Eight times a year
| | | | | 09 Nine times a year
| | | | | 10 Ten times a year
| | | | | 13 Three months/13 weeks
| | | | | 26 Six months/26 weeks
| | | | | 52 One year/12 months/52 weeks
| | | | | 90 Less than one week
| | | | | 95 One off/lump sum
| | | | | 96 None of these (EXPLAIN IN A NOTE)
| | | | |
| | | | | IF How much did ^ytxt ^usually re = RESPONSE [IaP =
| | | | | RESPONSE]
| | | | |
| | | | | IAA
| | | | |
| | | | | INTERVIEWER:Enter the amount.
| | | | | Range: 0..9997
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (((IaP = DONTKNOW) OR (IaP = REFUSAL)) OR (IaA =
| | | | | DONTKNOW)) OR (IaA = REFUSAL) [IaP = DONTKNOW OR
| | | | | IaP = REFUSAL OR IaA = DONTKNOW OR IaA = REFUSAL]
| | | | |
| | | | |
| | | | | IF How much did ^ytxt ^usually re = OneWeek [IaP = 1]
| | | | |
| | | | |
| | | | | IawB
| | | | | Was it.....

```





IF NOT (IaT IN [1, 3, 5, 7]) [NOT IaT = 1, 3, 5, 7]

**IAB**

For how many weeks or months in the last year, that is since , did receive ?

- 1 Answer given in weeks
- 2 Answer given in months

IF For how many weeks or months i = Weeks [IaB = 1]

**IABW**

INTERVIEWER: Enter number of weeks.  
Range: 0..52

END FILTER

IF For how many weeks or months i = Months [IaB = 2]

**IABM**

INTERVIEWER: Enter number of months.  
Range: 1..12

END FILTER

IF ((IaAgeOf >= 60) OR ((Qiaa.IAask = Yes) AND (DMAge] >= 60))) AND  
/ / / (IAskInst <> Yes) [IaAgeOf >= 60 OR Qiaa[PNum].IAask = Yes AND DMAge  
/ / / >= 60 AND IAskInst <> Yes]

**IAFUEL**

Did receive a Winter Fuel Payment in the last year (that is since )?

- 1 Yes
- 2 No

END FILTER

**IAFAINT**

Savings and Investments are an important part of some household's finances.

The next questions ask about a number of different kinds of savings or investments may have.

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

**IASI**

SHOW CARD F3

Which, if any, of these savings and investments have?

PROBE: What others?

INTERVIEWER: Code TESSA-only ISA (TOISA) as ISA.

CODE ALL THAT APPLY.

- 01 Current Account at a bank, building society or elsewhere
- 02 Savings Account at a bank, building society or elsewhere
- 03 TESSA
- 04 ISA
- 05 Premium Bonds
- 06 National Savings Accounts or Certificates
- 07 PEP
- 08 Stocks and/or Shares
- 09 Share Options/Employee share ownership
- 10 Share clubs
- 11 Unit or Investment Trusts
- 12 Bonds and Gilts (government or corporate)
- 95 Other Savings or Investments
- 96 None of these

[code maximum 14 out of 14 possible responses]

*IF (IaSI = SaAcc) OR (IaSI = CurrBAcc) [IaSI = 2 OR IaSI = 1]*

**IASAVA**

In total, how much have in (at the bank, building society or elsewhere)?

Range: 0..9999997

*IF (IaSava = DONTKNOW) OR (IaSava = REFUSAL) [IaSava = DONTKNOW OR IaSava = REFUSAL]*

**IaSavab**

Is it.....

BRACKETS (1000, 5000, 20000, 150000)

[Bracket results are recorded in **IaSal**, **IaSau**, **IaSae**, **IaSAr**]

END FILTER

**IASINT**

About how much interest did receive from (this/these) account(s) in the last year after tax?

Range: 0..99997

```

| | | | IF (IaSint = DONTKNOW) OR (IaSint = REFUSAL) [IaSint =
| | | | DONTKNOW OR IaSint = REFUSAL]
| | | |
| | | | IaSintB
| | | | Was it.....
| | | | BRACKETS (25, 100, 500, 7500)
| | | | [Bracket results are recorded in IaSil, IaSiu, IaSie, IaSir]
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF (IaSI = SaAcc) OR (IaSI = CurrBAcc) [IaSI = 2 OR IaSI = 1]
| | | |
| | | | IATI
| | | | How much have in TESSA's?
| | | | Range: 0..99997
| | | |
| | | | IF (IaTI = DONTKNOW) OR (IaTI = REFUSAL) [IaTI = DONTKNOW
| | | | OR IaTI = REFUSAL]
| | | |
| | | | IaTIB
| | | | Is it.....
| | | | BRACKETS (5000, 10000, 20000, 50000)
| | | | [Bracket results are recorded in IaTII, IaTIu, IaTie, IaTir]
| | | |
| | | | END FILTER
| | | |
| | | | IATII
| | | | About how much interest did receive from these accounts in the last year?
| | | | Range: 0..9997
| | | |
| | | | IF (IaTII = DONTKNOW) OR (IaTII = REFUSAL) [IaTII = DONTKNOW
| | | | OR IaTII = REFUSAL]
| | | |
| | | | IaTiib
| | | | Was it.....
| | | | BRACKETS (250, 500, 1000, 4000)
| | | | [Bracket results are recorded in IaTil, IaTiu, IaTie, IaTir]
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF (IaSI = SaAcc) OR (IaSI = CurrBAcc) [IaSI = 2 OR IaSI = 1]
| | | |
| | | | IAISA
| | | | Which of the following have in ISA(s)...
| | | |
| | | | INTERVIEWER: Read out.

```

CODE ALL THAT APPLY.

- 1 ... cash?
- 2 ... life insurance?
- 3 ... stocks and shares?

[code maximum 3 out of 3 possible responses]

**IACISA**

How much currently have in the cash components of ISA(s)?  
Range: 0..999997

*IF (IaCIsa = DONTKNOW) OR (IaCIsa = REFUSAL) [IaCIsa =  
DONTKNOW OR IaCIsa = REFUSAL]*

**IaCisab**

Is it.....

BRACKETS (5000, 10000, 15000, 20000)

[Bracket results are recorded in **IaCil**, **IaCiu**, **IaCie**, **IaCir**]

END FILTER

END FILTER

**IALISA**

How much is the life-insurance component of ISA(s) currently worth?  
Range: 0..999997

*IF (IaLIsa = DONTKNOW) OR (IaLIsa = REFUSAL) [IaLIsa =  
DONTKNOW OR IaLIsa = REFUSAL]*

**IaLisab**

Is it.....

BRACKETS (2000, 4000, 7500, 10000)

[Bracket results are recorded in **IaLil**, **IaLiu**, **IaLie**, **IaLir**]

END FILTER

END FILTER

**IASISA**

How much is the stocks and shares component of ISA(s) currently  
worth?  
Range: 0..999997

*IF (IaSIsa = DONTKNOW) OR (IaSIsa = REFUSAL) [IaSIsa =  
DONTKNOW OR IaSIsa = REFUSAL]*

**laSlsab**

Is it.....

BRACKETS (5000, 10000, 25000, 50000)

[Bracket results are recorded in **laSll, laSlu, laSle, laSir**]

END FILTER

END FILTER

**IAISAD**

Not including any income that was re-invested, about how much income did receive from (this / these) ISA(s) in the last year?

Range: 0..99997

*IF (IalsaD = DONTKNOW) OR (Ialsa = REFUSAL) [IalsaD = DONTKNOW OR Ialsa = REFUSAL]*

**IalsaDb**

Was it.....

BRACKETS (100, 150, 300, 2000)

[Bracket results are recorded in **Ialsl, Ialsu, Ialse, Ialsr**]

END FILTER

END FILTER

*IF (IaSI = SaAcc) OR (IaSI = CurrBAcc) [IaSI = 2 OR IaSI = 1]*

**IANPB**

How much have in Premium Bonds?

Range: 0..9999997

*IF (IaNPB = DONTKNOW) OR (IaNPB = REFUSAL) [IaNPB = DONTKNOW OR IaNPB = REFUSAL]*

**IaNPBB**

Is it.....

BRACKETS (100, 200, 500, 5000)

[Bracket results are recorded in **IaNPI, IaNPU, IaNPE, IANPr**]

END FILTER

**IANPBP**

How much prize income did receive from these bonds in the last year?

Range: 0..999997

*IF (IaNPBP = DONTKNOW) OR (IaNPBP = REFUSAL) [IaNPBP = DONTKNOW OR IaNPBP = REFUSAL]*

**IaPBPB**

```

| | | | | Was it.....
| | | | | BRACKETS (50, 100, 1000, 10000)
| | | | | [Bracket results are recorded in laPBI, laPBu, laPBe, laPBr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (laSI = SaAcc) OR (laSI = CurrBAcc) [laSI = 2 OR laSI = 1]
| | | | |
| | | | | IANs
| | | | | How much have in National Savings Accounts or Certificates?
| | | | | Range: 0..9999997
| | | | |
| | | | | IF (laNS = DONTKNOW) OR (laNS = REFUSAL) [laNS =
| | | | | DONTKNOW OR laNS = REFUSAL]
| | | | |
| | | | | laNSB
| | | | | Is it.....
| | | | | BRACKETS (500, 2500, 10000, 100000)
| | | | | [Bracket results are recorded in laNSI, laNSu, laNSe, laNSr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IANsI
| | | | | About how much interest did receive from these accounts or certificates in
| | | | | the last year after tax?
| | | | | Range: 0..99997
| | | | |
| | | | | IF (laNSi = DONTKNOW) OR (laNSi = REFUSAL) [laNSi =
| | | | | DONTKNOW OR laNSi = REFUSAL]
| | | | |
| | | | | laNSIB
| | | | | Was it.....
| | | | | BRACKETS (10, 50, 150, 5000)
| | | | | [Bracket results are recorded in laNSI, laNSu, laNSe, laNSr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (laSI = SaAcc) OR (laSI = CurrBAcc) [laSI = 2 OR laSI = 1]
| | | | |
| | | | | IAIP
| | | | | If chose to sell Personal Equity Plan(s) today, about how much would
| | | | | have after paying any fees?
| | | | | Range: 0..999997
| | | | |
| | | | | IF (laIP = DONTKNOW) OR (laIP = REFUSAL) [laIP = DONTKNOW
| | | | | OR laIP = REFUSAL]
| | | | |
| | | | |

```

**laipb**  
 Would it be.....  
 BRACKETS (5000, 10000, 25000, 100000)  
 [Bracket results are recorded in **laipl**, **laipu**, **laipe**, **laipr**]  
 END FILTER

**IAIPI**  
 Not including any income that was reinvested, about how much income did  
 receive from these Personal Equity Plan(s) in the last year?  
 Range: 0..99997  
  
*IF (laIPi = DONTKNOW) OR (laIPi = REFUSAL) [laIPi = DONTKNOW  
 OR laIPi = REFUSAL]*

**laIPib**  
 Was it.....  
 BRACKETS (200, 500, 1000, 7500)  
 [Bracket results are recorded in **laIPI**, **laIPu**, **laIPE**, **laIPr**]  
 END FILTER

END FILTER  
  
*IF ((laSI = Stocshar) OR (laSI = Shareop)) OR (laSI = Sharecl) [laSI = 8 OR  
 laSI = 9 OR laSI = 10]*

**IASSS**  
 If chose to sell today, about how much would have?  
 Range: 0..999997  
  
*IF (laSSS = DONTKNOW) OR (laSSS = REFUSAL) [laSSS =  
 DONTKNOW OR laSSS = REFUSAL]*

**laSSSb**  
 Would it be.....  
 BRACKETS (1000, 2500, 10000, 100000)  
 [Bracket results are recorded in **laSSI**, **laSSu**, **laSSe**, **laSSr**]  
 END FILTER

**IASSSI**  
 About how much dividend income did receive from in the last year after  
 tax?  
 Range: 0..999997  
  
*IF (laSSSi = DONTKNOW) OR (laSSSi = REFUSAL) [laSSSi =  
 DONTKNOW OR laSSSi = REFUSAL]*

**laSSSib**  
 Was it.....

BRACKETS (50, 150, 600, 15000)  
 [Bracket results are recorded in **laSSI, laSSu, laSSe, laSSr**]

END FILTER

**IASHTYP**  
 Which of the following types of shares have

INTERVIEWER: Read out.  
 CODE ALL THAT APPLY.

1 ...shares in privatised industries (for example, British Telecom, British Gas  
 or  
 RailTrack)?  
 2 ...shares in demutualised building societies or other mutual societies?  
 3 ...shares in other UK listed companies?  
 4 ...shares in foreign listed companies?  
 [code maximum 4 out of 4 possible responses]

END FILTER

*IF ((laSI = Stocshar) OR (laSI = Shareop)) OR (laSI = Sharecl) [laSI = 8 OR  
 laSI = 9 OR laSI = 10]*

**IAUIT**  
 If chose to sell Unit trusts or Investment trusts today, about how much  
 would have?  
 Range: 0..9999997

*IF (lauit = DONTKNOW) OR (lauit = REFUSAL) [lauit = DONTKNOW  
 OR lauit = REFUSAL]*

**lauitb**  
 Would it be.....  
 BRACKETS (5000, 10000, 50000, 200000)  
 [Bracket results are recorded in **lauil, lauiu, lauie, lauir**]

END FILTER

**IAUITI**  
 Not including any income that was re-invested, about how much income  
 did receive from these Unit trusts or Investment trusts in the last year after  
 tax?  
 Range: 0..999997

*IF (lauiti = DONTKNOW) OR (lauiti = REFUSAL) [lauiti =  
 DONTKNOW OR lauiti = REFUSAL]*

**lauitib**  
 Was it.....  
 BRACKETS (150, 500, 1250, 10000)

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| | | | | [Bracket results are recorded in lauil, lauiu, lauie, lauir]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | | IF ((laSI = Stocshar) OR (laSI = Shareop)) OR (laSI = Sharecl) [laSI = 8 OR
| | | | | laSI = 9 OR laSI = 10]
| | | | |
| | | | | IABG
| | | | | If chose to sell bonds and gilts today, about how much would have?
| | | | | Range: 0..9999997
| | | | |
| | | | | IF (labg = DONTKNOW) OR (labg = REFUSAL) [labg = DONTKNOW
| | | | | OR labg = REFUSAL]
| | | | |
| | | | | labgb
| | | | | Would it be.....
| | | | | BRACKETS (10000, 20000, 40000, 100000)
| | | | | [Bracket results are recorded in labgl, labgu, labge, labgr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IABGI
| | | | | About how much income did receive from these Bonds and Gilts in the last
| | | | | year after tax?
| | | | | Range: 0..9999997
| | | | |
| | | | | IF (labgi = DONTKNOW) OR (labgi = REFUSAL) [labgi =
| | | | | DONTKNOW OR labgi = REFUSAL]
| | | | |
| | | | | labgib
| | | | | Was it.....
| | | | | BRACKETS (100, 300, 1000, 50000)
| | | | | [Bracket results are recorded in labgl, labgu, labge, labgr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | | IF ((laSI = Stocshar) OR (laSI = Shareop)) OR (laSI = Sharecl) [laSI = 8 OR
| | | | | laSI = 9 OR laSI = 10]
| | | | |
| | | | | IASIO
| | | | | How much in total have in other savings or investments?
| | | | | Range: 0..9999997
| | | | |
| | | | | IF (laSlo = DONTKNOW) OR (laSlo = REFUSAL) [laSlo =
| | | | | DONTKNOW OR laSlo = REFUSAL]
| | | | |
| | | | | laSiob

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| | | | | Is it.....
| | | | | BRACKETS (1000, 5000, 20000, 100000)
| | | | | [Bracket results are recorded in laSil, laSiu, laSie, laSir]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IASIOI
| | | | | About how much interest did receive from these other savings or
| | | | | investments in the last year after tax?
| | | | | Range: 0..999997
| | | | |
| | | | | IF (laSiOi = DONTKNOW) OR (laSiOi = REFUSAL) [laSiOi =
| | | | | DONTKNOW OR laSiOi = REFUSAL]
| | | | |
| | | | | laSiOib
| | | | | Was it.....
| | | | | BRACKETS (50, 150, 500, 10000)
| | | | | [Bracket results are recorded in laSil, laSiu, laSie, laSir]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (laSI = RESPONSE) AND NOT (laSI = None) [laSI = RESPONSE AND
| | | | | NOT laSI = 96]
| | | | |
| | | | | IASICK
| | | | |
| | | | | INTERVIEWER: Please check financial assets summary below:
| | | | |
| | | | | Go back and
| | | | | change any that are incorrect.
| | | | | 1 Press <1> and <Enter> to continue.
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IALI
| | | | | have any life insurance policies?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | IF ^Dodoes[pnum] ^youorhw[pnum] h = Yes [laLi = 1]
| | | | |
| | | | | IF (Qiaa.IAask = Yes) AND (IDeadP12M[PNum] <> Yes) [Qiaa
| | | | | [PNum].IAask = Yes AND IDeadP12M <> Yes]
| | | | |
| | | | | IALIW
| | | | | Which of has life insurance policies?
| | | | | 1 Respondent only
| | | | | 2 Spouse / partner only

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| | | | | 3 Both
| | | | | END FILTER
| | | | | IF (laLiW IN [Respon, Both]) OR Which of ^youthem[PNum] has li =
| | | | | EMPTY [laLiW = 1, 3 OR laLiW = EMPTY]
| | | | |
| | | | | IALIYA
| | | | | How much would dependants get from life insurance policy or policies
| | | | | if died?
| | | | | Range: 0..9999997
| | | | |
| | | | | IF (laLiYA = DONTKNOW) OR (laLiYA = REFUSAL) [laLiYA =
| | | | | DONTKNOW OR laLiYA = REFUSAL]
| | | | |
| | | | | laliyab
| | | | | Would it be.....
| | | | | BRACKETS (20000, 50000, 100000, 400000)
| | | | | [Bracket results are recorded in lalil, laliu, lalie, lalir]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | | IF Which of ^youthem[PNum] has li IN [sparton, Both] [laLiW = 2, 3]
| | | | |
| | | | | IALIPA
| | | | | How much would 's dependants get from (his/her) life insurance policy
| | | | | or policies if (he/she) died?
| | | | | Range: 0..9999997
| | | | |
| | | | | IF (laLipA = DONTKNOW) OR (laLipA = REFUSAL) [laLipA =
| | | | | DONTKNOW OR laLipA = REFUSAL]
| | | | |
| | | | | lalipab
| | | | | Would it be.....
| | | | | BRACKETS (20000, 50000, 100000, 400000)
| | | | | [Bracket results are recorded in lalil, laliu, lalie, lalir]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | | IASC
| | | | | Do any of life insurance policy or policies have a savings component?
| | | | |
| | | | | INTERVIEWER: That is the value of the fund will be paid at some point in the
| | | | | future.
| | | | | 1 Yes

```

2 No

*IF Do any of ^litxt life insuranc = Yes [IaSC = 1]*

**IASCA**

About how much in total will (this / these) savings component(s) yield when (it/they) mature(s)?

Range: 0..9999997

*IF (IaSCA = DONTKNOW) OR (IaSCA = REFUSAL) [IaSCA = DONTKNOW OR IaSCA = REFUSAL]*

**IaSCAb**

Is it.....

BRACKETS (10000, 25000, 50000, 250000)

[Bracket results are recorded in **IaSCI**, **IaSCu**, **IaSCe**, **IaSCr**]

END FILTER

END FILTER

END FILTER

*IF (IaSI = RESPONSE) AND NOT (IaSI = None) [IaSI = RESPONSE AND NOT IaSI = 96]*

**IADOC**

INTERVIEWER: Code whether respondent consulted documents when answering the

financial assets questions.

- 1 Respondent consulted documents frequently
- 2 Respondent consulted documents occasionally
- 3 Respondent did not consult documents

**IAINTA**

INTERVIEWER: How accurate do you think the answers given by the respondent were?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

END FILTER

**IAPROP**

SHOW CARD F4

Which, if any, of these assets have?

PROBE: What others?

CODE ALL THAT APPLY.  
1 Houses, flats or holiday homes, including timeshares (not including this home)  
2 Farm or Business Property (such as a shop, warehouse or garage)  
3 Other land  
4 Money owed to you by others  
5 A trust  
6 A covenant or inheritance  
95 Other assets (including works of art or collectibles such as antiques or jewellery)  
96 None of these  
[code maximum 8 out of 8 possible responses]

**IAHOME**

If chose to sell house or holiday home and then paid off any debts on it, about how much would get?  
Range: 0..9999997

*IF (IaHome = DONTKNOW) OR (IaHome = REFUSAL) [IaHome = DONTKNOW OR IaHome = REFUSAL]*

**IaHomeb**

Would it be.....

BRACKETS (10000, 50000, 100000, 250000)

[Bracket results are recorded in **IaHol, IaHou, IaHoe, IaHor**]

END FILTER

**IAIR**

Did receive any income or rent from that property in the last year?

1 Yes

2 No

*IF Did ^youandhw[pnum] receive an = Yes [Iair = 1]*

**IAIRA**

How much income or rent did receive from that property in the last year, after any expenses and taxes?

Range: 0..999997

*IF (Iaira = DONTKNOW) OR (Iaira = REFUSAL) [Iaira = DONTKNOW OR Iaira = REFUSAL]*

**IaIRB**

Was it.....

BRACKETS (1500, 4000, 7500, 50000)

[Bracket results are recorded in **IaIRI, IaIRu, IaIRe, IaIRr**]

END FILTER

END FILTER

END FILTER

**IAFBPS**

If sold Farm or Business property and then paid off any debts on it, about how much would get?

Range: 0..999997

*IF (lafbps = DONTKNOW) OR (lafbps = REFUSAL) [lafbps = DONTKNOW OR lafbps = REFUSAL]*

**lafbpsb**

Would it be.....

BRACKETS (10000, 50000, 100000, 500000)

[Bracket results are recorded in **lafbl, lafbu, lafbe, lafbr**]

END FILTER

**IAFBPR**

Did receive any income or rent from that property in the last year?

1 Yes

2 No

*IF Did ^youandhw[pnum] receive an = Yes [lafbpr = 1]*

**IAFBA**

How much income or rent did receive from that property in the last year, after any expenses and taxes?

Range: 0..999997

*IF (lafBA = DONTKNOW) OR (lafBA = REFUSAL) [lafBA = DONTKNOW OR lafBA = REFUSAL]*

**lafbab**

Was it.....

BRACKETS (1500, 4000, 7500, 50000)

[Bracket results are recorded in **lafbl, lafbu, lafbe, lafbr**]

END FILTER

END FILTER

END FILTER

*IF (((laprop = OtherL) OR (laprop = Loans)) OR (laprop = Trust)) OR (laprop = Coven) OR (laprop = Other) [laprop = 3 OR laprop = 4 OR laprop = 5 OR laprop = 6 OR laprop = 95]*

**IAOASA**

How much is worth?  
Range: 0..9999997

*IF (IaOasA = DONTKNOW) OR (IaOasA = REFUSAL) [IaOasA =  
DONTKNOW OR IaOasA = REFUSAL]*

**IaOasAb**

Would it be.....

BRACKETS (5000, 7500, 20000, 100000)

[Bracket results are recorded in **IaOal, IaOau, IaOae, IaOar**]

END FILTER

END FILTER

**IAREGP**

Apart from anything you have already told me about, did receive any regular payments from people not living here in the past year (that is since )?

- 1 Yes
- 2 No

*IF Apart from anything you have a = Yes [Iaregp = 1]*

LOOP FOR k:= 1 TO 4

*IF (k = 1) OR (Pia4a[k - 1].IaOthP = Yes) [k = 1 OR Pia4a[k - 1].IaOthP = Yes]*

**IAPAY**

Thinking about 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

**IAPAYR**

What was the reason for this payment?

CODE ONE ONLY.

- 1 Financial support for children
- 2 Household bills/expenses
- 3 Spending money/allowance
- 4 Loan repayment
- 5 Maintenance or alimony
- 6 Royalties
- 85 ONCode
- 86 Irrel
- 95 Other (specify)

*IF @/What was the reason for this = other [lapayr = 95]*

**IAPAYO**

INTERVIEWER: Enter other reason.  
String: 60

END FILTER

**IAREGO**

What period did 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)

*IF What period did ^yourname[pnum = RESPONSE [larego = RESPONSE]*

**IAREGM**

And about how much did usually receive?  
Range: 0..9999997

END FILTER

*IF (((larego = DONTKNOW) OR (larego = REFUSAL)) OR (laregm = DONTKNOW)) OR (laregm = REFUSAL) [larego = DONTKNOW OR larego = REFUSAL OR laregm = DONTKNOW OR laregm = REFUSAL]*



```

| | | | | END FILTER
| | | | | END FILTER
| | | | | IAREGYR
| | | | | Did receive this for the whole year, that is since ?
| | | | | 1 Yes
| | | | | 2 No
| | | | | IF Did ^youname[pnum] receive thi = No [IaRegyr = 2]
| | | | | IAREGMW
| | | | | How many months/weeks did receive this payment for?
| | | | | INTERVIEWER: Code whether the answer is given in months or weeks.
| | | | | 1 months
| | | | | 2 weeks
| | | | | IAREGMWA
| | | | | INTERVIEWER: Enter number of months or weeks.
| | | | | Range: 0..97
| | | | | END FILTER
| | | | | IAOTHP
| | | | | Did receive any other regular payments from people not living here in
| | | | | the past year?
| | | | | 1 Yes
| | | | | 2 No
| | | | | END FILTER
| | | | | END FILTER
| | | | | END FILTER
| | | | | IF (Qiaa.IAask = Yes) AND (Qiaa.IAIntro = Continue) [Qiaa
| | | | | [PNum].IAask = Yes AND Qiaa[PNum].IAIntro = Continue]
| | | | | IAPAR
| | | | | Apart from anything you have already told me about, did receive any
| | | | | regular payments from people not living here in the past year (that is since
| | | | | )?
| | | | | 1 Yes
| | | | | 2 No
| | | | | IF Apart from anything you have a = Yes [Iapar = 1]
| | | | | LOOP FOR k:= 1 TO 4

```

IF (k = 1) OR (Pia4b[k - 1].laMrP = Yes) [k = 1 OR Pia4bk - 1.laMrP = Yes]

**IAPS**

Thinking about '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

**IAPR**

What was the reason for this payment?

CODE ONE ONLY.

- 1 Financial support for children
- 2 Household bills/expenses
- 3 Spending money/allowance
- 4 Loan repayment
- 5 Maintenance or Alimony
- 6 Royalties
- 85 ONCode
- 86 Irrel
- 95 Other (specify)

IF What was the reason for this p = Other [laPR = 95]

**IAPARO**

INTERVIEWER: Enter other reason.

String: 60

END FILTER

**IAPF**

What period did 's usual payments cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months





Range: 0..97

END FILTER

**IAMRP**

Did receive any other regular payments from people not living here in the past year?

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

END FILTER

**IAPK**

SHOW CARD F5

Which, if any, of these payments and payments in kind receive in the last year (that is since )?

PROBE: What others?

CODE ALL THAT APPLY.

- 1 Life insurance policy
- 2 Lump sum pension payout
- 3 Personal Accident plan
- 4 Other insurance payment
- 5 Redundancy payment
- 6 Inheritance or bequest (inc. inherited property)
- 7 Win(s) on the football pools, national lottery or other form of gambling
- 95 Other payment (SPECIFY)
- 96 None of these

[code maximum 9 out of 9 possible responses]

*IF (EditQre = Yes) AND (lapk = Other) [EditQre = 1 AND lapk = 95]*

**IAPKZ**

EDITOR : Back code here - CODE FRAME 35

Which, if any, of these payments and payments in kind have received in the last year (that is since )?

CODE ALL THAT APPLY.

- 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
- 85 Other answer - not codeable 01 to 07, or 96

```

| | | | 86 Irrelevant response - not codeable 01 to 07, or 96
| | | | 95 Other
| | | | 96 None of these
| | | | [code maximum 11 out of 11 possible responses]
| | | |
| | | | END FILTER
| | | |
| | | | IF (lapk = Other) AND ((EditQre <> Yes) OR (lapkz = EMPTY OR (lapkz
| | | | = Other))) [lapk = 95 AND EditQre <> 1 OR lapkz = EMPTY OR lapkz = 95]
| | | |
| | | |
| | | | IAPKO
| | | |
| | | | INTERVIEWER: Write in source of other payment.
| | | | String: 20
| | | |
| | | | END FILTER
| | | |
| | | | IF (lapk = RESPONSE) AND NOT (lapk = None) [lapk = RESPONSE
| | | | AND NOT lapk = 96]
| | | |
| | | | LOOP FOR n:= 1 TO 8
| | | |
| | | |
| | | | IAPKM
| | | | How much in total ?
| | | | Range: 0..999997
| | | |
| | | | IF (lapkm = DONTKNOW) OR (lapkm = REFUSAL) [lapkm[n] =
| | | | DONTKNOW OR lapkm[n] = REFUSAL]
| | | |
| | | | laPkmb
| | | | Was it.....
| | | | BRACKETS (2500, 5000, 15000, 50000)
| | | | [Bracket results are recorded in laPkl, laPku, laPke, laPkr]
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IADEBT
| | | | I would like to ask you about any other financial commitments may have
| | | | apart from mortgages or housing related loans.
| | | | currently owe any money on credit or store cards?
| | | | 1 Yes
| | | | 2 No

```

*IF I would like to ask you about = Yes [ladebt = 1]*

**IADEBM**

How much was the outstanding balance on these cards after the last monthly payment was made?

Range: 0..99997

*IF (ladebm = DONTKNOW) OR (ladebm = REFUSAL) [ladebm = DONTKNOW OR ladebm = REFUSAL]*

**ladebmb**

Was it.....

BRACKETS (1000, 2000, 5000, 25000)

[Bracket results are recorded in **ladel, ladeu, ladee, lader**]

END FILTER

END FILTER

**IAOWE**

currently owe any money to friends, relatives, or other private individuals?

1 Yes

2 No

*IF ^Dodoes[pnum] ^youorhw[pnum] c = Yes [laowe = 1]*

**IAOWEM**

How much owe?

Range: 0..99997

*IF (laowem = DONTKNOW) OR (laowem = REFUSAL) [laowem = DONTKNOW OR laowem = REFUSAL]*

**laowetb**

Was it.....

BRACKETS (1000, 2000, 5000, 25000)

[Bracket results are recorded in **laowl, laowu, laowe, laowr**]

END FILTER

**IAREGR**

make regular repayments on these loans?

1 Yes

2 No

*IF ^Dodoes[pnum] ^youandhw[pnum] = Yes [laRegR = 1]*

**IAREGRP**

What period do these repayments cover?

01 One week

- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

IF What period do these repayment = RESPONSE [laRegRP = RESPONSE]

**IAREP**

How much are usual repayments?  
Range: 0..9997

END FILTER

IF (((laRegRP = DONTKNOW) OR (laRegRP = REFUSAL)) OR (larep = DONTKNOW)) OR (larep = REFUSAL) [laRegRP = DONTKNOW OR laRegRP = REFUSAL OR larep = DONTKNOW OR larep = REFUSAL]

IF What period do these repayment = OneWeek [laRegRP = 1]

**laRPWb**

Is it.....  
BRACKETS (10, 20, 50, 150)  
[Bracket results are recorded in laRPI, laRPu, laRPe, laRPr]

ELSE

IF What period do these repayment = TwoWeek [laRegRP = 2]

**laRPfb**

Is it.....  
BRACKETS (20, 40, 100, 300)  
[Bracket results are recorded in laRPI, laRPu, laRPe, laRPr]

ELSE

IF What period do these repayment IN [Fourweek, OneMonth] [laRegRP = 4, 5]



| | | | *IF (laloan = RESPONSE) AND NOT (laloan = None) [laloan = RESPONSE*  
| | | | *AND NOT laloan = 96]*

| | | | **IALOAM**

| | | | How much in total owe on these loans?  
| | | | Range: 0..99997

| | | | *IF (laloam = DONTKNOW) OR (laloam = REFUSAL) [laloam =*  
| | | | *DONTKNOW OR laloam = REFUSAL]*

| | | | **laloamb**

| | | | Is it.....  
| | | | BRACKETS (1000, 2000, 5000, 25000)  
| | | | [Bracket results are recorded in **lalol, lalou, laloe, lalor**]

| | | | END FILTER

| | | | *IF NOT ((laloan.CARDINAL = 1) AND (laloan = Over)) [NOT*  
| | | | *laloan.CARDINAL = 1 AND laloan = 3]*

| | | | **IALREP**

| | | | What period usual repayments on these loans cover?

| | | | INTERVIEWER: If doesn't make repayments, code 97.

- | | | | 01 One week
- | | | | 02 Two weeks
- | | | | 03 Three weeks
- | | | | 04 Four weeks
- | | | | 05 Calendar month
- | | | | 07 Two calendar months
- | | | | 08 Eight times a year
- | | | | 09 Nine times a year
- | | | | 10 Ten times a year
- | | | | 13 Three months/13 weeks
- | | | | 26 Six months/26 weeks
- | | | | 52 One year/12 months/52 weeks
- | | | | 90 Less than one week
- | | | | 95 One off/lump sum
- | | | | 96 None of these (EXPLAIN IN A NOTE)
- | | | | 97 Doesn't make repayments

| | | | *IF (laloreP = RESPONSE) AND (laloreP <> NoPay) [laloreP =*  
| | | | *RESPONSE AND laloreP <> 97]*

| | | | **IALRE**

| | | | How much usual repayments on these loans?  
| | | | Range: 0..99997

| | | | END FILTER

```

| | | | | IF (((lalreP = DONTKNOW) OR (lalreP = REFUSAL)) OR (lalre =
| | | | | DONTKNOW)) OR (lalre = REFUSAL) [lalreP = DONTKNOW OR lalreP
| | | | | = REFUSAL OR lalre = DONTKNOW OR lalre = REFUSAL]
| | | | |
| | | | | IF What period ^ldodoes[pnum] ^yo = OneWeek [lalreP = 1]
| | | | |
| | | | | lalrpwb
| | | | | Is it.....
| | | | | BRACKETS (10, 20, 50, 150)
| | | | | [Bracket results are recorded in lalrl, lalru, lalre, lalrr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF What period ^ldodoes[pnum] ^yo = TwoWeek [lalreP = 2]
| | | | |
| | | | |
| | | | | lalrpfb
| | | | | Is it.....
| | | | | BRACKETS (20, 40, 100, 300)
| | | | | [Bracket results are recorded in lalrl, lalru, lalre, lalrr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF What period ^ldodoes[pnum] ^yo IN [Fourweek,
| | | | | OneMonth] [lalreP = 4, 5]
| | | | |
| | | | | lalrpmb
| | | | | Is it.....
| | | | | BRACKETS (40, 80, 200, 600)
| | | | | [Bracket results are recorded in lalrl, lalru, lalre, lalrr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF What period ^ldodoes[pnum] ^yo IN [OneYear,
| | | | | LumpSum] [lalreP = 52, 95]
| | | | |
| | | | | lalrpyb
| | | | | Is it.....
| | | | | BRACKETS (500, 1000, 2500, 7500)
| | | | | [Bracket results are recorded in lalrl, lalru, lalre, lalrr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | lalrpob
| | | | | Is it.....
| | | | | BRACKETS (40, 80, 200, 600)
| | | | | [Bracket results are recorded in lalrl, lalru, lalre, lalrr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER

```

```

| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (ICoupleN > 0) AND (ICAskIA = Yes) [ICoupleN > 0 AND ICAskIA =
| | | | | Yes]
| | | | |
| | | | | IAJNT
| | | | | Can I just check, have any savings, investments, property or other assets
| | | | | that are held jointly with ?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | IF Can I just check, ^Idodoes[pnu = Yes [IaJnt = 1]
| | | | |
| | | | | IAAM
| | | | | About how much would personal share amount to, minus share of any
| | | | | joint debts might have?
| | | | | Range: 0..999997
| | | | |
| | | | | IF (IaAm = DONTKNOW) OR (IaAm = REFUSAL) [IaAm =
| | | | | DONTKNOW OR IaAm = REFUSAL]
| | | | |
| | | | | IaAmB
| | | | | Would it amount to.....
| | | | | BRACKETS (1000, 2500, 10000, 50000)
| | | | | [Bracket results are recorded in IaAmI, IaAmu, IaAme, IaAmr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF ((AskPay = 0) OR (AskPay = AllocP)) AND Qiae[PNum].Ialoan <>
| | | | | EMPTY [AskPay = 0 OR AskPay = AllocP AND Qiae[PNum].Ialoan <>
| | | | | EMPTY]
| | | | |
| | | | | IAFCON
| | | | | SHOW CARD F7
| | | | |
| | | | | Which of the phrases on the card best describes how getting along
| | | | | financially these days?
| | | | | 1 manage very well

```

- 2 manage quite well
- 3 get by alright
- 4 don't manage very well
- 5 have some financial difficulties
- 6 have severe financial difficulties

*IF (ICouple = Married) OR (ICouple = Cohabit) [ICouple = Married OR  
ICouple = Cohabit]*

**IAORGF**  
SHOW CARD F8

People organise their family finances in different ways.  
Which of the methods on this card comes closest to the way you organise yours.

It doesn't have to fit exactly - just choose the nearest one.

You can just tell me the number which applies.

CODE ONE ONLY.

- 1 I look after all the household money except my partner's personal spending money
- 2 My partner looks after all the household money except my personal spending money
- 3 I am given a housekeeping allowance. My partner looks after the rest of the money
- 4 My partner is given a housekeeping allowance. I look after the rest of the money
- 5 We share and manage our household finances jointly
- 6 We keep our finances completely separate
- 85 ONCode
- 86 Irrel
- 95 Some other arrangement

*IF SHOW CARD F8 @/People organise = Otherarr [laorgf = 95]*

**IAORGD**

INTERVIEWER: Please record details.

String: 60

END FILTER

**IAFIND**

In your household who has the final say in big financial decisions?

DO NOT PROMPT.

CODE ONE ONLY.

- 1 Respondent
- 2 Partner
- 3 Both have equal say

```

| | | | | 85 ONCode
| | | | | 86 Irrel
| | | | | 95 Other (specify)
| | | | |
| | | | | IF @/In your household who has th = Other [lafind = 95]
| | | | |
| | | | | IAFINW
| | | | | INTERVIEWER: Write in other answer.
| | | | | String: 20
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (AskPay = AllocP) AND Qiae[PNum].laloan <> EMPTY [AskPay =
| | | | | AllocP AND Qiae[PNum].laloan <> EMPTY]
| | | | |
| | | | | LOOP FOR hloop:= 1 TO 16
| | | | |
| | | | | IF ((IndStat[hloop] < 1) AND (DMPres = Yes)) AND (DMAge >= 16)
| | | | | [IndStat < 1 AND DMPres = 1 AND DMAge >= 16]
| | | | |
| | | | | IAPAYW
| | | | | During the last year did do any work for pay?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | IF During the last year did ^dmna = Yes [lapayw = 1]
| | | | |
| | | | | IAEARN
| | | | | About how much money did earn from all jobs in the last year,
| | | | | before any tax or other deductions?
| | | | | Range: 0..999997
| | | | |
| | | | | IF (laearn = DONTKNOW) OR (laearn = REFUSAL) [laearn =
| | | | | DONTKNOW OR laearn = REFUSAL]
| | | | |
| | | | | laearnb
| | | | | Was it.....
| | | | | BRACKETS (10000, 20000, 35000, 100000)
| | | | | [Bracket results are recorded in laeal, laeau, laeae, laear]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER

```

END FILTER

*IF Ask IAREc? = Yes [AskRec = 1]*

**IAREC**

Not including any job income, about how much in total did receive in the last year from benefits, pensions, interest, gifts or anything else (before any taxes or deductions)?

Range: 0..999997

*IF (larec = DONTKNOW) OR (larec = REFUSAL) [larec = DONTKNOW OR larec = REFUSAL]*

**larecb**

Was it.....

BRACKETS (250, 500, 1000, 5000)

[Bracket results are recorded in **larel, lareu, laree, larer**]

END FILTER

**IAOM**

(Do/does) have more than £2,500 total in bank accounts, other financial assets, vehicles, property, or other investments?

1 Yes

2 No

*IF (Do/does) ^ptxt have more than = Yes [laom = 1]*

**IAOMM**

About how much altogether would that amount to, minus any debts he/she/they might have?

Range: 0..999997

*IF (laomm = DONTKNOW) OR (laomm = REFUSAL) [laomm = DONTKNOW OR laomm = REFUSAL]*

**laommb**

Would it amount to.....

BRACKETS (1000, 5000, 20000, 150000)

[Bracket results are recorded in **laomi, laomu, laome, laomr**]

END FILTER

END FILTER

END FILTER

END FILTER

**IAX**

| | | INTERVIEWER: The Income and Assets section is finished.  
| | |  
| | | Please enter 1 here to make the  
| | | program store the current time and date.  
| | | Range: 1..1  
| | |  
| | | END FILTER  
| | |

# **HOUSING MODULE (HO)**

**IHONOW**

INTERVIEWER: Do you wish to complete the Housing Section now?

- 1 Yes
- 2 No

*IF @/@/INTERVIEWER: Do you wish t = Yes [IHoNow = 1]*

*IF (QHD.DHHou = DONTKNOW) AND (IndNo = 1) [QHD.DHHou = DONTKNOW AND IndNo = 1]*

**IHOWHO**

INTERVIEWER: Check ARF label for the number of the respondent who answered the Housing questions last time. Suggest to the respondent that the same person answers HO this time.

INTERVIEWER: Code who questions on Housing will be addressed to.

- 1
- 2

END FILTER

**IHODAT**

INTERVIEWER: Please enter the date of this section of the interview.

*IF (HFFW.HHldr = RESPONSE) AND (HoAsk = HFFW.HHldr.CARDINAL) [HFFW.HHldr = RESPONSE AND HoAsk = HFFW.HHldr.CARDINAL]*

**HOWHO**

I'd like to check some general information about accommodation.

Is accommodation still in ?

- 1 Yes
- 2 No

END FILTER

*IF I'd like to check some general = EMPTY OR (HoWho = No) [HoWho = EMPTY OR HoWho = 2]*

**HOWHN**

In whose name is the accommodation owned or rented?

CODE ALL THAT APPLY.

- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08
- 09
- 10
- 11
- 12
- 13
- 14
- 15
- 16
- 97 Not a household member

[code maximum 17 out of 17 possible responses]

LOOP FOR k:= 1 TO 9

*IF (((DMPres = Yes) AND NOT (HoWhN = k)) AND NOT (HoWhN =  
QHD.CoupleN)) AND (IAgeOf >= 16) [DMPres = 1 AND NOT HoWhN = k  
AND NOT HoWhN = QHD.CoupleN AND IAgeOf >= 16]*

### HOBAS

On what basis living here? ...READ OUT...

CODE ONE ONLY.

- 1 ... pay regular rent,
- 2 pay something from time to time,
- 3 or, live here rent free?

*IF @/On what basis ^are\_you livin = RegRent [HoBas = 1]*

### HOBP

Thinking about last rent payment, what period did it cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year

```

| | | | | 13 Three months/13 weeks
| | | | | 26 Six months/26 weeks
| | | | | 52 One year/12 months/52 weeks
| | | | | 90 Less than one week
| | | | | 95 One off/lump sum
| | | | | 96 None of these (EXPLAIN IN A NOTE)
| | | | | IF @/Thinking about ^your last re = RESPONSE [HoBP =
| | | | | RESPONSE]
| | | | |
| | | | | HOBA
| | | | | How much was last rent payment?
| | | | |
| | | | | INTERVIEWER: Enter amount.
| | | | | Range: 0..99997
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (((HoBP = DONTKNOW) OR (HoBP = REFUSAL)) OR (HoBA =
| | | | | DONTKNOW)) OR (HoBA = REFUSAL) [HoBP = DONTKNOW OR
| | | | | HoBP = REFUSAL OR HoBA = DONTKNOW OR HoBA =
| | | | | REFUSAL]
| | | | |
| | | | | IF @/Thinking about ^your last re = OneWeek [HoBP = 1]
| | | | |
| | | | | HoBPW
| | | | | Was it.....
| | | | | BRACKETS (20, 40, 60, 150)
| | | | | [Bracket results are recorded in HoBPI, HoBPu, HoBPe, HoBPr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF @/Thinking about ^your last re = TwoWeek [HoBP = 2]
| | | | |
| | | | |
| | | | | HoBPf
| | | | | Was it.....
| | | | | BRACKETS (40, 80, 120, 300)
| | | | | [Bracket results are recorded in HoBPI, HoBPu, HoBPe, HoBPr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF @/Thinking about ^your last re IN [Fourweek,
| | | | | OneMonth] [HoBP = 4, 5]
| | | | |
| | | | | HoBPm
| | | | | Was it.....
| | | | | BRACKETS (80, 160, 240, 600)
| | | | | [Bracket results are recorded in HoBPI, HoBPu, HoBPe, HoBPr]

```



In which of these ways this accommodation?

INTERVIEWER: If own outright or own with help of a mortgage or loan, include owning

with equity release.

- 1 Own it outright
- 2 Buying it with the help of a mortgage or loan
- 3 Pay part rent and part mortgage (shared ownership)
- 4 Rent it
- 5 Live here rent free (including rent free in relative's/friend's property; excluding squatting)
- 6 Squatting

*IF (HoTenu IN [ShOwnsh, Rent]) AND (HoEli = Yes) [HoTenu = 3, 4 AND HoEli = 1]*

**HOJOB**

Does the accommodation go with the job of someone in the household?

- 1 Yes
- 2 No

**HOLAND**

SHOW CARD G2

Who is landlord?

INTERVIEWER: Include New Town Development in Code 1.

- 1 Local authority or council
- 2 Housing association or co-operative or charitable trust
- 3 Individual private landlord
- 4 Employer of a household member
- 5 Relative/friend of a household member
- 95 Another organisation / individual

**HOFURN**

Is accommodation provided ... READ OUT ...

- 1 ...furnished
- 2 partly furnished (e.g. curtains and carpets only)
- 3 or, unfurnished?

END FILTER

*IF (HoTenu = ShOwnsh) AND (HoEli = Yes) [HoTenu = 3 AND HoEli = 1]*

**HOPART**

What percentage of the property buying?

- 1 25 percent
- 2 50 percent
- 3 75 percent
- 95 Other

*IF What percentage of the propert = Other [HoPart = 95]*

**HPOPR**

INTERVIEWER: ENTER OTHER PERCENTAGE  
Range: 1..99

END FILTER

END FILTER

*IF (HoTenu IN [Rent, ShOwnsh]) AND (HoEli = Yes) [HoTenu = 4,  
ShOwnsh AND HoEli = 1]*

**HOPERI**

Thinking about last rent payment, what period did this cover?

INTERVIEWER: If 100% rent rebate, code 97.

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)
- 97 DOESN'T MAKE RENT PAYMENTS

*IF (HoPeri = RESPONSE) AND (HoPeri <> NOTP) [HoPeri =  
RESPONSE AND HoPeri <> 97]*

**HORENT**

How much was last rent payment (including any services or charges but  
after any rebates)?

INTERVIEWER: If 100% rent rebate, code 99997.  
Range: 0..99997

```

| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (((HoPeri = DONTKNOW) OR (HoPeri = REFUSAL)) OR (HoRent =
| | | | | DONTKNOW)) OR (HoRent = REFUSAL) [HoPeri = DONTKNOW OR
| | | | | HoPeri = REFUSAL OR HoRent = DONTKNOW OR HoRent = REFUSAL]
| | | | |
| | | | |
| | | | | IF Thinking about ^yourname[pnum] = OneWeek [HoPeri = 1]
| | | | |
| | | | | HoRntWB
| | | | | Was it.....
| | | | | BRACKETS (20, 40, 60, 150)
| | | | | [Bracket results are recorded in HoRnl, HoRnu, HoRne, HoRnr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF Thinking about ^yourname[pnum] = TwoWeek [HoPeri = 2]
| | | | |
| | | | |
| | | | | HoRntfB
| | | | | Was it.....
| | | | | BRACKETS (40, 80, 120, 300)
| | | | | [Bracket results are recorded in HoRnl, HoRnu, HoRne, HoRnr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF Thinking about ^yourname[pnum] IN [Fourweek, OneMonth]
| | | | | [HoPeri = 4, 5]
| | | | |
| | | | | HoRntmB
| | | | | Was it.....
| | | | | BRACKETS (80, 160, 240, 600)
| | | | | [Bracket results are recorded in HoRnl, HoRnu, HoRne, HoRnr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF Thinking about ^yourname[pnum] IN [OneYear,
| | | | | LumpSum] [HoPeri = 52, 95]
| | | | |
| | | | | HoRntyB
| | | | | Was it.....
| | | | | BRACKETS (1000, 2000, 3000, 7500)
| | | | | [Bracket results are recorded in HoRnl, HoRnu, HoRne, HoRnr]
| | | | |
| | | | | ELSE
| | | | |
| | | | | HoRntoB
| | | | | Was it.....
| | | | | BRACKETS (80, 160, 240, 600)
| | | | | [Bracket results are recorded in HoRnl, HoRnu, HoRne, HoRnr]

```

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF (HoRent <> 99997) AND (HoPeri <> NOTP) [HoRent <> 99997 AND  
HoPeri <> 97]*

**HOINCL**

SHOW CARD G3

Did last rent payment include any of these?

PROBE : What else?

CODE ALL THAT APPLY.

- 1 Water charges
- 2 Sewerage charges
- 3 Land or business premises
- 4 Separate Garage
- 5 Heating or lighting or hot water
- 6 Council Tax
- 96 None of these

[code maximum 7 out of 7 possible responses]

**HOINCA**

SHOW CARD G4

Did last rent payment include any of these?

PROBE : What else?

CODE ALL THAT APPLY

- 1 Meals
- 2 Gardening
- 3 Cleaning
- 4 Warden or porter
- 5 Security service/guard
- 95 Other services
- 96 None of these

[code maximum 6 out of 7 possible responses]

*IF (EditQre = Yes) AND (HoInca = Other) [EditQre = 1 AND HoInca  
= 95]*

**HOINAZ**

EDITOR : Back code here - CODE FRAME 38

Did last rent payment include any of these?

CODE ALL THAT APPLY.

- 1 Meals
  - 2 Gardening
  - 3 Cleaning
  - 4 Warden or porter
  - 5 Security service/guard
  - 85 Other answer - not codeable 01 to 05, or 96
  - 86 Irrelevant response - not codeable 01 to 05, or 96
  - 95 Other
  - 96 None of these
- [code maximum 9 out of 9 possible responses]

END FILTER

*IF (Holnca = Other) AND ((EditQre <> Yes) OR (HolnaZ = EMPTY  
OR (HolnaZ = Other))) [Holnca = 95 AND EditQre <> 1 OR HolnaZ =  
EMPTY OR HolnaZ = 95]*

**HOOINC**

What other services does rent include?

INTERVIEWER: Write in.  
String: 60

END FILTER

**HOHBEN**

Did you receive any housing benefit (also known as rent rebate or rent allowance) to help pay your last rent?

- 1 Yes
- 2 No

*IF Did you receive any housing be = Yes [HoHBen = 1]*

**HORHB**

Did you receive the benefit directly (cash, cheque or into a bank account) or was it deducted from your rent?

- 1 Deducted from rent
- 2 Received it directly

*IF Did you receive the benefit di = Rec [HorHB = 2]*

**HOHBCK**

Can I just check, was the last rent payment that you just told me about before or after taking off the Housing Benefit?

- 1 Before
- 2 After

END FILTER

END FILTER

```

| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (((HoPeri = NOTP) OR (HoRent = 99997)) OR (HorHB = Ded)) OR
| | | | | (HoHBck = Aft) [HoPeri = 97 OR HoRent = 99997 OR HorHB = 1 OR
| | | | | HoHBck = 2]
| | | | |
| | | | | HOREBA
| | | | | What would last rent payment have been if housing benefit had not been
| | | | | deducted from it?
| | | | | Range: 0..99997
| | | | |
| | | | | IF (HoReba = RESPONSE) AND (HoPeri = NOTP) [HoReba =
| | | | | RESPONSE AND HoPeri = 97]
| | | | |
| | | | | HOREBP
| | | | | What period would this cover?
| | | | | 01 One week
| | | | | 02 Two weeks
| | | | | 03 Three weeks
| | | | | 04 Four weeks
| | | | | 05 Calendar month
| | | | | 07 Two calendar months
| | | | | 08 Eight times a year
| | | | | 09 Nine times a year
| | | | | 10 Ten times a year
| | | | | 13 Three months/13 weeks
| | | | | 26 Six months/26 weeks
| | | | | 52 One year/12 months/52 weeks
| | | | | 90 Less than one week
| | | | | 95 One off/lump sum
| | | | | 96 None of these (EXPLAIN IN A NOTE)
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (((((HoReba = DONTKNOW) OR (HoReba = REFUSAL)) OR
| | | | | (HoPeri = DONTKNOW)) OR (HoPeri = REFUSAL)) OR (HoRebP =
| | | | | DONTKNOW)) OR (HoRebP = REFUSAL) [HoReba = DONTKNOW OR
| | | | | HoReba = REFUSAL OR HoPeri = DONTKNOW OR HoPeri = REFUSAL
| | | | | OR HoRebP = DONTKNOW OR HoRebP = REFUSAL]
| | | | |
| | | | | IF Thinking about ^yourname[pnum] = OneWeek [HoPeri = 1]
| | | | |
| | | | | HoRebwb
| | | | | Would it have been.....
| | | | | BRACKETS (30, 50, 75, 150)
| | | | | [Bracket results are recorded in HoRel, HoReu, HoRee, HoRer]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF Thinking about ^yourname[pnum] = TwoWeek [HoPeri = 2]

```



- period did this cover?
- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

**HOHBA**

How much housing benefit did you receive last time?

Range: 0..99997

*IF How much housing benefit did y = NONRESPONSE OR Thinking about your last housi = NONRESPONSE [HoHBa = NONRESPONSE OR HoHBP = NONRESPONSE]*

*IF Thinking about your last housi = OneWeek [HoHBP = 1]*

**HoHBwb**

Would it have been.....

BRACKETS (30, 50, 75, 150)

[Bracket results are recorded in **HoHBI, HoHBu, HoHBe, HoHBr**]

ELSE

*IF Thinking about your last housi = TwoWeek [HoHBP = 2]*

**HoHBfb**

Would it have been.....

BRACKETS (60, 100, 150, 300)

[Bracket results are recorded in **HoHBI, HoHBu, HoHBe, HoHBr**]

ELSE

*IF Thinking about your last housi IN [Fourweek, OneMonth] [HoHBP = 4, 5]*

**HoHBmb**

Would it have been.....

BRACKETS (120, 200, 300, 600)

[Bracket results are recorded in **HoHBI, HoHBu, HoHBe, HoHBr**]



```

| | | | | EDITOR : Back code here - CODE FRAME 39
| | | | |
| | | | | SHOW CARD G4
| | | | | Does accommodation include any of these?
| | | | | PROBE : What else?
| | | | | CODE ALL THAT APPLY
| | | | | 1 Meals
| | | | | 2 Garden
| | | | | 3 Cleaning
| | | | | 4 Warden or porter
| | | | | 5 Security service / guard
| | | | | 85 Other answer - not codeable 01-05, or 96
| | | | | 86 Irrelevant response - not codeable 01-05, or 96
| | | | | 95 Other
| | | | | 96 None of these
| | | | | [code maximum 9 out of 9 possible responses]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (HoHB = Other) AND ((EditQre <> Yes) OR (HoHBz = EMPTY OR
| | | | | (HoHBz = Other))) [HoHB = 95 AND EditQre <> 1 OR HoHBz = EMPTY
| | | | | OR HoHBz = 95]
| | | | |
| | | | | HOHBO
| | | | | What other services does accommodation come with?
| | | | | String: 60
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | HORTSET
| | | | |
| | | | | INTERVIEWER: The Renting section is finished.
| | | | |
| | | | | Please enter 1 here to make the
| | | | | program store the current time and date.
| | | | | Range: 1..1
| | | | |
| | | | | END FILTER
| | | | |
| | | | | HOMSTSET
| | | | |
| | | | | INTERVIEWER: Start of Mortgages section.
| | | | |
| | | | | Please enter 1 here to make the program store
| | | | | the current time and date.
| | | | | Range: 1..1

```

| | | | IF (((HoTenu IN [Own, Buymortg, ShOwnsh]) AND (HoEli = Yes)) AND  
| | | | NOT ((HoTenuSt = 1) AND In what year did ^youname[pnum] =  
| | | | RESPONSE))) AND NOT ((HoTenu = Own) AND (HoTenuN = No)) [HoTenu  
| | | | = Own, Buymortg, ShOwnsh AND HoEli = Yes AND NOT HoTenuSt = 1  
| | | | AND HFFW.HoYear = RESPONSE AND NOT HoTenu = Own AND  
| | | | HoTenuN = No]

| | | | **HOYEAR**

| | | | In what year did buy this accommodation?

| | | | Range: 1900..2050

| | | | IF NOT ((HoTenuSt = 1) AND How much did ^youname[pnum] pa =  
| | | | RESPONSE)) [NOT HoTenuSt = 1 AND HFFW.HoPay = RESPONSE]

| | | | **HOPAY**

| | | | How much did pay for the property?

| | | | INTERVIEWER: Enter amount to the nearest £.

| | | | Range: 0..9999997

| | | | IF How much did ^youname[pnum] pa = RESPONSE [HoPay =  
| | | | RESPONSE]

| | | | ELSE

| | | | IF (HoPay = DONTKNOW) OR (HoPay = REFUSAL) [HoPay =  
| | | | DONTKNOW OR HoPay = REFUSAL]

| | | | **HoPayb**

| | | | Was it.....

| | | | BRACKETS (10000, 20000, 50000, 150000)

| | | | [Bracket results are recorded in **HoPal, HoPau, HoPae, HoPar**]

| | | | END FILTER

| | | | END FILTER

| | | | END FILTER

| | | | **HORTB**

| | | | SHOW CARD G6

| | | | Who did buy this accommodation from?

| | | | INTERVIEWER: Code 'Right to Buy Scheme' as 'Council or Local Authority'.

| | | | CODE ONE

| | | | ONLY.

| | | | 1 Private Owner

| | | | 2 Council or Local Authority

- 3 Housing Association
- 4 Landlord
- 5 Family or relative
- 96 None of these

IF SHOW CARD G6 @/Who did ^younam <> Council) AND (HoRTB  
/<> Council)) AND Have ^youname[pnum] ever bough <> RESPONSE)  
/[HFFW.HoRTB <> 2 AND HoRTB <> 2 AND HFFW.HoRTBe <>  
/RESPONSE]

**HORTBE**

Have ever bought a home from a council or local authority, for example  
under the Right to Buy scheme?

- 1 Yes
- 2 No

END FILTER

END FILTER

**HOEVM**

When bought this accommodation, did take out a mortgage?

- 1 Yes
- 2 No

**HOORM**

ever take out any mortgages or loans secured on this property?

- 1 Yes
- 2 No

IF (HoTenu IN [Own, Buymortg, ShOwnsh]) AND (HoEli = Yes) [HoTenu  
/ = Own, Buymortg, ShOwnsh AND HoEli = Yes]

**HOSELLP**

How much would expect to get for home if sold it today?

Range: 0..9999997

IF (HoSellIP = DONTKNOW) OR (HoSellIP = REFUSAL) [HoSellIP =  
/ DONTKNOW OR HoSellIP = REFUSAL]

**HoSellpb**

Would it be.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in **HoSel**, **HoSeu**, **HoSee**, **HoSer**]

END FILTER

END FILTER

IF SHOW CARD G1 @/In which of the IN [Buymortg, ShOwnsh]  
/[HoTenu = Buymortg, ShOwnsh]

```

| | | | | IF (((QHD.DhSameH = Yes) AND SHOW CARD G1 @/In which of the
| | | | | IN [Buymortg, ShOwnsh])) AND @/How many mortgages or loans =
| | | | | RESPONSE)) AND (HoAsk > 0)) OR (AnyHHSame = No) [QHD.DhSameH
| | | | | = 1 AND HFFW.HoTenu = 2, 3 AND HFFW.HoOutM = RESPONSE AND
| | | | | HoAsk > 0 OR AnyHHSame = No]
| | | | |
| | | | | ELSE
| | | | |
| | | | | HOOUTM
| | | | |
| | | | | How many mortgages or loans have outstanding on this property?
| | | | | Range: 1..10
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF @/How many mortgages or loans = RESPONSE) OR (HoOutM =
| | | | | RESPONSE) [HFFW.HoOutM = RESPONSE OR HoOutM = RESPONSE]
| | | | |
| | | | | LOOP FOR k:= 1 TO 5
| | | | |
| | | | | IF k <= Max number in each mortgage lo [k <= MaxMort]
| | | | |
| | | | | IF Mortgage status: = 1 [HoDMSt = 1]
| | | | |
| | | | | HOMSAM
| | | | | We now want to update the details of your mortgages. Last time
| | | | | we interviewed , told us that had .HoOutM mortgage.
| | | | |
| | | | | was .
| | | | | still have this mortgage?
| | | | |
| | | | | INTERVIEWER: Code yes if years left to run has changed or if the
mortgage has
| | | | | been extended.
| | | | | 1 Yes
| | | | | 2 No
| | | | | 3 SPONTANEOUS: Never had this mortgage (details incorrect)
| | | | |
| | | | | IF We now want to update the deta = Yes [HoMSam = 1]
| | | | |
| | | | | HOMEXT
| | | | | Have extended this mortgage since we last interviewed ()?
| | | | |
| | | | | That is, borrowed additional money from the same lender as
| | | | | part of the same agreement (for which the repayments are
| | | | | combined with the repayments for the original amount).
| | | | | 1 Yes
| | | | | 2 No

```









interviewed ()?

That is, taken out additional money as part of a different agreement?

- 1 Yes
- 2 No

*IF @/^CHaveHas[PNum] ^youname[PNU = Yes [HoMNew = 1]*

**HOMNEWN**

How many additional mortgages (remortgages) taken out on this property since we last interviewed ?

INTERVIEWER: Enter number of mortgages.  
Range: 1..10

**HOMNUSE**

Apart from paying off an existing mortgage, what did use the new mortgage(s) for?

CODE ALL THAT APPLY.

- 1 Home extensions
  - 2 Home improvements
  - 3 Car purchase
  - 4 Other consumable goods
  - 95 Other (Please specify)
  - 96 None of these - used only to pay off existing mortgage
- [code maximum 5 out of 6 possible responses]

*IF (EditQre = Yes) AND (HoMNUse = Other) [EditQre = 1 AND HoMNUse = 95]*

**HOMNUSEZ**

EDITOR: Back code here. CODE FRAME 42

Apart from paying off an existing mortgage, what did use the new mortgage(s) for?

CODE ALL THAT APPLY.

- 1 Home extensions
  - 2 Home improvements
  - 3 Car purchase
  - 4 Other consumable goods
  - 85 Other answer - not codeable 01-04
  - 86 Irrelevant response - not codeable 01-04
  - 95 Other
  - 96 None of these - used only to pay off existing mortgage
- [code maximum 5 out of 8 possible responses]

END FILTER

```
| | | | | IF (HoMNUse = Other) AND ((EditQre <> Yes) OR (HoMNUseZ =  
| | | | | EMPTY OR (HoMNUseZ = Other))) [HoMNUse = 95 AND EditQre <>  
| | | | | 1 OR HoMNUseZ = EMPTY OR HoMNUseZ = 95]
```

**HOMNUO**

INTERVIEWER: Please specify other use.  
String: 80

END FILTER

```
| | | | | IF (HoMNUse = Other) AND ((EditQre <> Yes) OR (HoMNUseZ =  
| | | | | EMPTY OR (HoMNUseZ = Other))) [HoMNUse = 95 AND EditQre <>  
| | | | | 1 OR HoMNUseZ = EMPTY OR HoMNUseZ = 95]
```

ELSE

IF HoMNUse.CARDINAL > 1 [HoMNUse.CARDINAL > 1]

**HOMNREA**

Apart from paying off an existing mortgage, what was the main  
use of the new mortgage(s) - that is what was most of the money  
spent on?

- 1
- 2
- 3
- 4
- 95

END FILTER

```
| | | | | IF (HoMNUse = RESPONSE) AND NOT (HoMNUse = None)  
| | | | | [HoMNUse = RESPONSE AND NOT HoMNUse = 96]
```

**HOMNEWA**

How much did use for ?  
Range: 0..100000

```
| | | | | IF How much did ^youname[PNum] us = NONRESPONSE  
| | | | | [HoMNewa = NONRESPONSE]
```

**HoMNewb**

Was it.....  
BRACKETS (5000, 10000, 30000, 75000)  
[Bracket results are recorded in **HoMNI**, **HoMNU**, **HoMNe**, **HoMNR**]

END FILTER

END FILTER



**HOMUSE**

What was the mortgage extension used for?

CODE ALL THAT APPLY.

- 1 Home extension
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods
- 5 Other use (please specify)

[code maximum 5 out of 5 possible responses]

*IF (EditQre = Yes) AND (HoMUse = Other) [EditQre = 1 AND HoMUse = 5]*

**HOMUSEZ**

EDITOR: Baxck code here. CODE FRAME 41 What was the mortgage extension used for?

CODE ALL THAT APPLY.

- 1 Home extension
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods
- 5 Other
- 85 Other answer - not codeable 01-04
- 86 Irrelevant response - not codeable 01-04

[code maximum 7 out of 7 possible responses]

END FILTER

*IF (HoMUse = Other) AND ((EditQre <> Yes) OR (HoMUseZ = EMPTY OR (HoMUseZ = Other))) [HoMUse = 5 AND EditQre <> 1 OR HoMUseZ = EMPTY OR HoMUseZ = 5]*

**HOMUSEO**

INTERVIEWER: Please specify.  
String: 60

END FILTER

*IF HoMUse.CARDINAL > 1 [HoMUse.CARDINAL > 1]*

**HOMREA**

What was the main reason for this - that is, what was most of the money spent on?

1





```

| | | | | | | | | | PartRE)) [HoMTy = 2, 3 OR PNewMort = 2 AND
| | | | | | | | | | HFFW.QMort[PSeq].HoMTy = EndowM, PartRE]
| | | | | | | | | |
| | | | | | | | | | HOVE
| | | | | | | | | | What is the current value of endowment?
| | | | | | | | | | Range: 0..9999997
| | | | | | | | | |
| | | | | | | | | | IF (HoVe = DONTKNOW) OR (HoVe = REFUSAL)
| | | | | | | | | | [HoVe = DONTKNOW OR HoVe = REFUSAL]
| | | | | | | | | |
| | | | | | | | | | HoVeb
| | | | | | | | | | Is it.....
| | | | | | | | | | BRACKETS (10000, 25000, 50000, 250000)
| | | | | | | | | | [Bracket results are recorded in HoVel, HoVeu, HoVee, HoVer]
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | HOYML
| | | | | | | | | | How many years does this mortgage or loan have left to run?
| | | | | | | | | | Range: 0..50
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | IF @/How many mortgages or loans <> NONRESPONSE AND
| | | | | | | | | | (QHD.DhSameH <> No) [HFFW.HoOutM <> NONRESPONSE AND
| | | | | | | | | | QHD.DhSameH <> 2]
| | | | | | | | | |
| | | | | | | | | | HOMMIS
| | | | | | | | | |
| | | | | | | | | | Can I just check, hold any other mortgages on this property?
| | | | | | | | | | 1 Yes
| | | | | | | | | | 2 No
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | IF @/Can I just check, ^Idodoes[P = Yes [HoMMis = 1]
| | | | | | | | | |
| | | | | | | | | | HOMMISN
| | | | | | | | | |
| | | | | | | | | | How many other mortgages have on this property?
| | | | | | | | | | Range: 1..10
| | | | | | | | | |
| | | | | | | | | | LOOP FOR k:= 1 TO 5

```



**HOMUSE**

What was the mortgage extension used for?

CODE ALL THAT APPLY.

- 1 Home extension
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods
- 5 Other use (please specify)

[code maximum 5 out of 5 possible responses]

*IF (EditQre = Yes) AND (HoMUse = Other) [EditQre = 1 AND HoMUse = 5]*

**HOMUSEZ**

EDITOR: Baxck code here. CODE FRAME 41 What was the mortgage extension used for?

CODE ALL THAT APPLY.

- 1 Home extension
- 2 Home improvements
- 3 Car purchase
- 4 Other consumable goods
- 5 Other
- 85 Other answer - not codeable 01-04
- 86 Irrelevant response - not codeable 01-04

[code maximum 7 out of 7 possible responses]

END FILTER

*IF (HoMUse = Other) AND ((EditQre <> Yes) OR (HoMUseZ = EMPTY OR (HoMUseZ = Other))) [HoMUse = 5 AND EditQre <> 1 OR HoMUseZ = EMPTY OR HoMUseZ = 5]*

**HOMUSEO**

INTERVIEWER: Please specify.

String: 60

END FILTER

*IF HoMUse.CARDINAL > 1 [HoMUse.CARDINAL > 1]*

**HOMREA**

What was the main reason for this - that is, what was most of the money spent on?

- 1
- 2





```

| | | | | | | | | | HFFW.QMort[PSeq].HoMTy = EndowM, PartRE]
| | | | | | | | | |
| | | | | | | | | | HOVE
| | | | | | | | | | What is the current value of endowment?
| | | | | | | | | | Range: 0..9999997
| | | | | | | | | |
| | | | | | | | | | IF (HoVe = DONTKNOW) OR (HoVe = REFUSAL)
| | | | | | | | | | [HoVe = DONTKNOW OR HoVe = REFUSAL]
| | | | | | | | | |
| | | | | | | | | | HoVeb
| | | | | | | | | | Is it.....
| | | | | | | | | | BRACKETS (10000, 25000, 50000, 250000)
| | | | | | | | | | [Bracket results are recorded in HoVel, HoVeu, HoVee, HoVer]
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | HOYML
| | | | | | | | | | How many years does this mortgage or loan have left to run?
| | | | | | | | | | Range: 0..50
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | IF (HoMNum > 0) OR (HoOutM > 0) [HoMNum > 0 OR HoOutM > 0]
| | | | | | | | | |
| | | | | | | | | | HOMREP
| | | | | | | | | | How much are monthly repayments for mortgage(s) or loan(s),
| | | | | | | | | | including insurance premiums?
| | | | | | | | | | Range: 0..99997
| | | | | | | | | |
| | | | | | | | | | IF (HoMRep = DONTKNOW) OR (HoMRep = REFUSAL) [HoMRep
| | | | | | | | | | = DONTKNOW OR HoMRep = REFUSAL]
| | | | | | | | | |
| | | | | | | | | | HoMRepb
| | | | | | | | | | Are they.....
| | | | | | | | | | BRACKETS (75, 150, 250, 1000)
| | | | | | | | | | [Bracket results are recorded in HoMRI, HoMRu, HoMRe, HoMRr]
| | | | | | | | | |
| | | | | | | | | | END FILTER
| | | | | | | | | |
| | | | | | | | | | IF (((HoTenu IN [Buymortg, ShOwnsh]) OR (HoMNewN > 0)) OR

```

| | | | | (HoMMisN > 0)) OR (NofExt > 0) [HoTenu = Buymortg, ShOwnsh OR  
| | | | | HoMNewN > 0 OR HoMMisN > 0 OR NofExt > 0]

| | | | | **HOINC**

| | | | | Does this repayment include any of the following...

| | | | | INTERVIEWER: Read out each in turn.

| | | | | Code all that apply.

- | | | | | 1 ... a mortgage protection policy?
- | | | | | 2 ... buildings insurance?
- | | | | | 3 ... contents or possessions insurance?
- | | | | | 4 ... other extra payments?
- | | | | | 96 None of these

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

| | | | | IF (EditQre = Yes) AND (Holnc = Other) [EditQre = 1 AND Holnc  
| | | | | = 4]

| | | | | **HOINCZ**

| | | | | EDITOR : Back code here - CODE FRAME 43

| | | | | Does this repayment include any of the following...

| | | | | INTERVIEWER: Read out each in turn and code all that apply.

- | | | | | 1 ... a mortgage protection policy?
- | | | | | 2 ... Buildings insurance?
- | | | | | 3 ... Contents or possessions insurance?
- | | | | | 4 Other
- | | | | | 85 Other answer - not codeable 01-03, or 96
- | | | | | 86 Irrelevant response - not codeable 01-03, or 96
- | | | | | 96 None of these

| | | | | [code maximum 7 out of 7 possible responses]

| | | | | END FILTER

| | | | | IF (Holnc = Other) AND ((EditQre <> Yes) OR (HolncZ = EMPTY  
| | | | | OR (HolncZ = Other))) [Holnc = 4 AND EditQre <> 1 OR HolncZ =  
| | | | | EMPTY OR HolncZ = 4]

| | | | | **HOINCE**

| | | | | What else repayment include?

| | | | | WRITE IN

| | | | | String: 60

| | | | | END FILTER

| | | | | IF (((Holnc = MortgPP) OR (Holnc = Holns)) OR (Holnc =  
| | | | | Contlns)) OR (Holnc = Other) [Holnc = 1 OR Holnc = 2 OR Holnc = 3  
| | | | | OR Holnc = 4]

**HOINCC**

How much of monthly repayment is for those additional items?  
Range: 0..9997

END FILTER

END FILTER

END FILTER

*IF (HoOutM = 1) AND (AnyReMort <> Yes) [HoOutM = 1 AND  
AnyReMort <> 1]*

**HOEVRE**

Not including original mortgage did ever take out any additional  
mortgages or loans on this property?

- 1 Yes
- 2 No

END FILTER

**HOMETSET**

INTERVIEWER: The Mortgages section is finished.

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

Range: 1..1

END FILTER

*IF (HoTenu IN [Own, Buymortg, ShOwnsh]) AND (HoEli = Yes) [HoTenu  
= Own, Buymortg, ShOwnsh AND HoEli = Yes]*

**HORINC**

It is possible to raise money based on the value of your home. These  
arrangements are sometimes known as equity release schemes.

...READ OUT...

CODE ALL THAT APPLY.

- 1 ...a home income or mortgage annuity plan,
- 2 a home reversion scheme,
- 3 a private arrangement (for example with a relative),
- 4 or, in some other way?
- 96 None of these
- 97

[code maximum 5 out of 6 possible responses]

*IF EditQre <> Yes [EditQre <> 1]*



```

| | | | | INTERVIEWER: Record details.
| | | | | String: 40
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (HoRInc = IncPlan) OR It is possible to raise money = IncPlan) AND
| | | | | NOT (HoRInc = Disp) [HoRInc = 1 OR HFFW.HoRinc = 1 AND NOT
| | | | | HoRInc = 97]
| | | | |
| | | | |
| | | | | HORMOL
| | | | | How much was the mortgage or loan from home income or mortgage
| | | | | annuity plan?
| | | | | Range: 0..9999997
| | | | |
| | | | | IF (HoRmol = DONTKNOW) OR (HoRmol = REFUSAL) [HoRmol
| | | | | = DONTKNOW OR HoRmol = REFUSAL]
| | | | |
| | | | | HoRMolb
| | | | | Was it.....
| | | | | BRACKETS (10000, 25000, 50000, 100000)
| | | | | [Bracket results are recorded in HoRMI, HoRMu, HoRMe, HoMRr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | HORINM
| | | | | per month?
| | | | | Range: 0..99997
| | | | |
| | | | | IF ^How_much per month? = NONRESPONSE [HoRinm =
| | | | | NONRESPONSE]
| | | | |
| | | | | HoRinmb
| | | | | Is it.....
| | | | | BRACKETS (75, 150, 250, 1000)
| | | | | [Bracket results are recorded in HoRil, HoRiu, HoRie, HoRir]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF ^How_much per month? = NONRESPONSE [HoRinm =
| | | | | NONRESPONSE]
| | | | |
| | | | | HORFEE
| | | | |
| | | | | the fee that paid to the insurer for taking out this scheme...

```

```

| | | | | ... READ OUT...
| | | | | 1 ... a fixed amount,
| | | | | 2 a percentage of the value of the mortgage,
| | | | | 3 or, a percentage of the value of the house?
| | | | |
| | | | | IF @/^Was the fee that ^heshe[pnu = ValMort [HoRfee = 2]
| | | | |
| | | | | HORFEP
| | | | | What was this percentage?
| | | | | Range: 1..50
| | | | |
| | | | | END FILTER
| | | | |
| | | | | HOALF
| | | | |
| | | | | Did pay an additional legal fee?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | IF @/Did ^heshe[pnum] pay an addi = Yes [HoAlf[1] = 1]
| | | | |
| | | | | HOALFM
| | | | | How much was this additional legal fee?
| | | | | Range: 0..99997
| | | | |
| | | | | IF (HoAlfm = DONTKNOW) OR (HoAlfm = REFUSAL)
| | | | | [HoAlfm = DONTKNOW OR HoAlfm = REFUSAL]
| | | | |
| | | | | HoAlfmb
| | | | | Was it.....
| | | | | BRACKETS (100, 250, 500, 2500)
| | | | | [Bracket results are recorded in HoAll, HoAlu, HoAle, HoAlr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | HOALI
| | | | |
| | | | | taken out additional life insurance?
| | | | | 1 Yes
| | | | | 2 No
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (HoRInc = HRevSch) OR It is possible to raise money = HrevSch)
| | | | | AND NOT (HoRInc = Disp)) [HoRInc = 2 OR HFFW.HoRinc = 2 AND NOT
| | | | | HoRInc = 97]
| | | | |
| | | | |

```

**HORPAY**

receive a one-off payment or receive regular payments from home reversion scheme?

- 1 One-off payment
- 2 Regular payments
- 3 Both

*IF @/^Did ^heshe[pnum] receive a IN [Oneoff, Both] [HoRPay = 1, 3]*

**HORPM**

How much was this one-off payment?  
Range: 0..999997

*IF How much was this one-off paym = NONRESPONSE [Horpm = NONRESPONSE]*

**Horpmb**

Was it.....  
BRACKETS (2500, 7500, 15000, 100000)  
[Bracket results are recorded in **Horpl, Horpu, Horpe, Horpr**]

END FILTER

END FILTER

END FILTER

*IF (HoRPay IN [RegInc, Both]) OR @/^Did ^heshe[pnum] receive a = RegInc) AND NOT (Disp IN HoRInc) [HoRPay = 2, 3 OR HFFW.HoRpay = 2 AND NOT Disp = HoRInc]*

**HOMINC**

?  
Range: 0..99997

*IF (HoMinc = DONTKNOW) OR (HoMinc = REFUSAL) [HoMinc = DONTKNOW OR HoMinc = REFUSAL]*

**HoMincb**

Is it.....  
BRACKETS (75, 150, 250, 1000)  
[Bracket results are recorded in **HoMil, HoMiu, HoMie, HoMir**]

END FILTER

END FILTER

| | | | | IF (HoRPay IN [RegInc, Both]) OR @/^Did ^heshe[pnum] receive a  
| | | | | = RegInc) AND NOT (Disp IN HoRInc)) [HoRPay = 2, 3 OR  
| | | | | HFFW.HoRpay = 2 AND NOT Disp = HoRInc]

| | | | | **HORMS**

| | | | | pay a rent to remain in home with this scheme?

- | | | | | 1 Yes
- | | | | | 2 No

| | | | | END FILTER

| | | | | IF (HoRms = Yes) OR ^Do\_ ^youname[pnum] pay a rent = Yes) AND  
| | | | | NOT (HoRInc = Disp)) AND NOT ^Do\_ ^youname[pnum] pay a rent =  
| | | | | Yes) AND (HoRInc = HRevSch)) AND (HoRInc = Disp)) AND (HoRms =  
| | | | | No))) [HoRms = 1 OR HFFW.HoRms = 1 AND NOT HoRInc = 97 AND  
| | | | | NOT HFFW.HoRms = 1 AND HoRInc = 2 AND HoRInc = 97 AND  
| | | | | HoRms = 2]

| | | | | **HORRM**

| | | | | much rent do currently pay per month?

| | | | | Range: 0..99997

| | | | | IF (HoRrm = DONTKNOW) OR (HoRrm = REFUSAL) [HoRrm =  
| | | | | DONTKNOW OR HoRrm = REFUSAL]

| | | | | **HorrmB**

| | | | | Is it.....

| | | | | BRACKETS (75, 150, 250, 1000)

| | | | | [Bracket results are recorded in **Horrl, Horru, Horre, Horrr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | IF (HoRms = Yes) OR ^Do\_ ^youname[pnum] pay a rent = Yes) AND  
| | | | | NOT (HoRInc = Disp)) AND NOT ^Do\_ ^youname[pnum] pay a rent =  
| | | | | Yes) AND (HoRInc = HRevSch)) AND (HoRInc = Disp)) AND (HoRms =  
| | | | | No))) [HoRms = 1 OR HFFW.HoRms = 1 AND NOT HoRInc = 97 AND  
| | | | | NOT HFFW.HoRms = 1 AND HoRInc = 2 AND HoRInc = 97 AND  
| | | | | HoRms = 2]

| | | | | **HORFEE**

| | | | | the fee that paid to the insurer for taking out this scheme...

| | | | | ... READ OUT...

- | | | | | 1 ... a fixed amount,
- | | | | | 2 a percentage of the value of the mortgage,
- | | | | | 3 or, a percentage of the value of the house?

*IF @/^Was the fee that ^heshe[pnu = ValMort [HoRfee = 2]*

**HORFEP**

What was this percentage?

Range: 1..50

END FILTER

**HOALF**

Did pay an additional legal fee?

- 1 Yes
- 2 No

*IF @/Did ^heshe[pnum] pay an addi = Yes [HoAlf[2] = 1]*

**HOALFM**

How much was this additional legal fee?

Range: 0..99997

*IF (HoAlfm = DONTKNOW) OR (HoAlfm = REFUSAL)*

*[HoAlfm = DONTKNOW OR HoAlfm = REFUSAL]*

**HoAlfmb**

Was it.....

BRACKETS (100, 250, 500, 2500)

[Bracket results are recorded in **HoAll, HoAlu, HoAle, HoAlr**]

END FILTER

END FILTER

**HOALI**

taken out additional life insurance?

- 1 Yes
- 2 No

END FILTER

END FILTER

**HORPOS**

Thinking about private arrangement, receive regular payments from this source in return for a claim on the value of property?

- 1 Yes
- 2 No

*IF @/Thinking about ^yourname[pnu = Yes [HoRpos = 1]*

**HORPOF**

What period do these payments usually cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks
- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

*IF @/What period do these payment = RESPONSE [HoRpof = RESPONSE]*

**HORMU**

How much usually receive?  
Range: 0..999997

END FILTER

*IF (((HoRpof = DONTKNOW) OR (HoRpof = REFUSAL)) OR (HoRmu = DONTKNOW)) OR (HoRmu = REFUSAL) [HoRpof = DONTKNOW OR HoRpof = REFUSAL OR HoRmu = DONTKNOW OR HoRmu = REFUSAL]*

*IF @/What period do these payment = OneWeek [HoRpof = 1]*

**HoRmwb**

Is it.....

BRACKETS (25, 50, 100, 1000)

[Bracket results are recorded in **HoRml, HoRmu, HoRme, HoRmr**]

ELSE

*IF @/What period do these payment = TwoWeek [HoRpof = 2]*

**HoRmfb**

Is it.....

BRACKETS (50, 100, 200, 2000)

[Bracket results are recorded in **HoRml, HoRmu, HoRme, HoRmr**]



**HORPCM**

How much did receive?  
Range: 0..999997

*IF (HoRpcm = DONTKNOW) OR (HoRpcm = REFUSAL)*  
*[HoRpcm = DONTKNOW OR HoRpcm = REFUSAL]*

**HoRpcmb**

Was it.....  
BRACKETS (1000, 5000, 10000, 100000)  
[Bracket results are recorded in **HoRpl, HoRpu, HoRpe, HoRpr**]

END FILTER

END FILTER

END FILTER

END FILTER

*IF @/Thinking about ^yourname[pnu = Yes) AND NOT (HoRInc =*  
*Disp) [HFFW.HoRpos = 1 AND NOT HoRInc = 97]*

**HORPOSO**

Are you still receiving regular payments from the private arrangement  
that you told us about last time?  
1 Yes  
2 No

*IF Are you still receiving regula = Yes [HoRposo = 1]*

**HORPOFO**

What period do these payments usually cover?  
01 One week  
02 Two weeks  
03 Three weeks  
04 Four weeks  
05 Calendar month  
07 Two calendar months  
08 Eight times a year  
09 Nine times a year  
10 Ten times a year  
13 Three months/13 weeks  
26 Six months/26 weeks  
52 One year/12 months/52 weeks  
90 Less than one week  
95 One off/lump sum  
96 None of these (EXPLAIN IN A NOTE)

*IF What period do these payments = RESPONSE [HoRpofo =*





**HOCTA**

How much Council Tax currently pay?

INTERVIEWER: Code how answer given.

- 1 Annual amount
- 2 Instalment
- 3 Percentage
- 4 Does not pay Council Tax

*IF How much Council Tax ^do\_you c = AnnualA [HoCTA = 1]*

**HOCTY**

INTERVIEWER: Enter annual amount.

Range: 0..9997

*IF (HoCTY = DONTKNOW) OR (HoCTY = REFUSAL) [HoCTY =  
DONTKNOW OR HoCTY = REFUSAL]*

**HoCTYb**

Is it.....

BRACKETS (500, 750, 1000, 2000)

[Bracket results are recorded in **HoCTI**, **HoCTu**, **HoCTe**, **HoCTr**]

END FILTER

ELSE

*IF How much Council Tax ^do\_you c = Instalm [HoCTA = 2]*

**HOCTI**

INTERVIEWER: Enter amount of instalment.

Range: 0..9997

*IF (HOCTI = DONTKNOW) OR (HOCTI = REFUSAL) [HOCTI =  
DONTKNOW OR HOCTI = REFUSAL]*

**HoCTIb**

Is it.....

BRACKETS (50, 75, 100, 200)

[Bracket results are recorded in **HoCTI**, **HoCTu**, **HoCTe**, **HoCTr**]

END FILTER

**HOCTN**

How many instalments are there, over the whole year?

Range: 1..50

END FILTER

END FILTER

*IF (HoCTA IN [AnnualA, Instalm]) AND (HHTot = 1) [HoCTA = 1, 2  
AND HHTot = 1]*

**HODISC**

receive a 25% single person discount in relation to Council Tax?

- 1 Yes
- 2 No

END FILTER

*IF How much Council Tax ^do\_you c <> DNot [HoCTA <> 4]*

**HOCTB**

allowed Council Tax benefit or rebate, to help pay Council Tax?

- 1 Yes
- 2 No

*IF ^Areis[pnum] ^youname[pnum] al = Yes [HoCTB = 1]*

**HOCTBA**

How much was allowed?

Range: 0..9997

*IF (HoCTBA = DONTKNOW) OR (HoCTBA = REFUSAL) [HoCTBA  
= DONTKNOW OR HoCTBA = REFUSAL]*

**HoCTBAb**

Was it.....

BRACKETS (50, 75, 100, 200)

[Bracket results are recorded in **HoCTI, HoCTu, HoCTe, HoCTr**]

END FILTER

**HOCTBP**

What period did this cover?

- 01 One week
- 02 Two weeks
- 03 Three weeks
- 04 Four weeks
- 05 Calendar month
- 07 Two calendar months
- 08 Eight times a year
- 09 Nine times a year
- 10 Ten times a year
- 13 Three months/13 weeks
- 26 Six months/26 weeks
- 52 One year/12 months/52 weeks

- 90 Less than one week
- 95 One off/lump sum
- 96 None of these (EXPLAIN IN A NOTE)

END FILTER

END FILTER

*IF whether interviewing at same address as last time <> Yes*

*[QHD.DhSameH <> 1]*

**HOSW**

How much did pay for water and sewerage charges in the last year, that is since ?

Range: 0..9997

*IF (HoSW = DONTKNOW) OR (HoSW = REFUSAL) [HoSW =*

*DONTKNOW OR HoSW = REFUSAL]*

**HoSWb**

Was it.....

BRACKETS (50, 100, 200, 500)

[Bracket results are recorded in **HoSWI, HoSWu, HoSWe, HoSWr**]

END FILTER

END FILTER

*IF NOT (HoTenu IN [RentFree, Squat, Own]) AND (HoEli = Yes) [NOT*

*HoTenu = 5, 6, 1 AND HoEli = 1]*

**HODIFF**

Many people these days are finding it difficult to keep up with their housing payments. In the last 12 months would you say had difficulties paying for accommodation?

1 Yes

2 No

**HODIFFT**

In the last 12 months ever found more than two months behind with ?

1 Yes

2 No

**HODOC**

INTERVIEWER: Code whether respondent consulted documents when answering the

questions about mortgage / rent.

1 Respondent consulted documents

2 Respondent did not consult documents

HOINTA

INTERVIEWER: How accurate do you think the answers given by the respondent were?

- 1 Very accurate
- 2 Fairly accurate
- 3 Not very accurate
- 4 Not at all accurate

END FILTER

HORET

INTERVIEWER: Ask or code.

Some accomodation is only available to people over a certain age (usually 55 or 60).

This is sometimes called 'retirement housing'.

Is home retirement housing?

INTERVIEWER: If the respondent seems unsure, code no.

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

*IF (QHD.DhSameH <> Yes) OR ((QHD.DhSameH = Yes) AND @/In what year did ^youname[pn <> RESPONSE)) [QHD.DhSameH <> 1 OR QHD.DhSameH = 1 AND HFFW.HoMove <> RESPONSE]*

HOMOVE

In what year did move to this accommodation?

INTERVIEWER:If born there, code year of birth.

IF ASKED: Code earliest year a member of household moved to the accommodation.  
Range: 1900..2050

END FILTER

*IF whether interviewing at same address as last time <> Yes [QHD.DhSameH <> 1]*

HORMOV

People move for many different reasons. In general terms, what were the reasons you moved home?

INTERVIEWER: Probe fully.  
CODE ALL THAT APPLY.

- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08
- 09
- 10
- 11
- 12
- 95

[code maximum 13 out of 13 possible responses]

*IF (EditQre = Yes) AND (HoRMov = Other) [EditQre = 1 AND HoRMov = 95]*

**HORMOVZ**

EDITOR: Back code here. CODE FRAME 45

People move for many different reasons. In general terms, what were the reasons you moved home?

CODE ALL THAT APPLY.

- 01 Job relocated
- 02 Moved to start a new job
- 03 Moved to a better area, or one with fewer problems
- 04 Moved to a more suitable home
- 05 Bought own home
- 06 Was evicted, couldn't afford to pay rent or had home repossessed
- 07 Moved for health reasons
- 08 Moved in with partner
- 09 Split from partner
- 10 Moved in with family and friends
- 11 Moved to be nearer family and/or friends
- 12 Other financial reasons such as to release capital or 'couldn't afford to run house
- 85 Other answer - not codeable 01 to 12
- 86 Irrelevant response - not codeable 01 to 12
- 95 Other

[code maximum 15 out of 15 possible responses]

END FILTER

*IF (HoRMov = Other) AND ((EditQre <> Yes) OR (HoRMovZ = EMPTY OR (HoRMovZ = Other))) [HoRMov = 95 AND EditQre <> 1 OR HoRMovZ = EMPTY OR HoRMovZ = 95]*

**HORMOVO**

INTERVIEWER: Please specify the other reason.  
String: 80

END FILTER

*IF HoRMov.CARDINAL > 1 [HoRMov.CARDINAL > 1]*

**HORMAIN**

What was your main reason for moving home?

- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08
- 09
- 10
- 11
- 12
- 95

*IF @/What was your main reason fo = Suit [HoRMain = 4]*

**HORMOVA**

In what way is your new home more suitable?

INTERVIEWER: Probe fully.

CODE ALL THAT APPLY.

- 1 Smaller
- 2 Larger
- 3 Fewer maintenance problems
- 4 More suitable given respondent's health problems
- 5 Other reason (Please specify)

[code maximum 5 out of 5 possible responses]

*IF (EditQre = Yes) AND (HoRMova = Other) [EditQre = 1 AND  
HoRMova = 5]*

**HORMOVAZ**

EDITOR: Back code here. CODE FRAME 46

In what way is your new home more suitable?

INTERVIEWER: Probe fully.

CODE ALL THAT APPLY.

- 1 Smaller
  - 2 Larger
  - 3 Fewer maintenance problems
  - 4 More suitable given respondent's health problems
  - 5 Other
  - 85 Other answer - not codeable 01 to 05
  - 86 Irrelevant response - not codeable 01 to 05
- [code maximum 7 out of 7 possible responses]

END FILTER

*IF (HoRMova = Other) AND ((EditQre <> Yes) OR (HoRMovaZ = EMPTY OR (HoRMovaZ = Other))) [HoRMova = 5 AND EditQre <> 1 OR HoRMovaZ = EMPTY OR HoRMovaZ = 5]*

**HORMOV B**

INTERVIEWER: Please specify the other reason.  
String: 250

END FILTER

END FILTER

**HOROOM**

How many rooms occupy here, including bedrooms but not counting  
bathrooms, kitchens and any rooms let or sublet?  
Range: 1..30

END FILTER

**HOADPT**

SHOW CARD G7

Some homes have special features to assist people who have physical  
impairments or health problems. Whether use them or not, does home have  
any of the features on this card?

PROBE: What others?

CODE ALL THAT APPLY.

- 01 Widened doorways or hallways
- 02 Ramps or street level entrances
- 03 Hand rails
- 04 Automatic or easy open doors
- 05 Accessible parking or drop off site
- 06 Bathroom modifications

- 07 Kitchen modifications
- 08 Lift
- 09 Chair lift or stair glide
- 10 Alerting devices, such as button alarms
- 95 Any other special features
- 96 None of these

[code maximum 12 out of 12 possible responses]

**HOPROB**

SHOW CARD G8

Does accommodation have any of these problems?

PROBE: What others?

CODE ALL THAT APPLY.

- 01 Shortage of space
- 02 Noise from neighbours
- 03 Other street noise, such as traffic, businesses, factories
- 04 Too dark, not enough light
- 05 Pollution, grime or other environmental problems caused by traffic or industry
- 06 Rising damp in floors and walls
- 07 Water getting in from roof, gutters or windows
- 08 Bad condensation problem
- 09 Problems with electrical wiring or plumbing
- 10 General rot and decay
- 11 Problems with insects, mice or rats
- 12 Too cold in winter
- 95 Other problems
- 96 None of these

[code maximum 14 out of 14 possible responses]

*IF (EditQre = Yes) AND (HoProb = Other) [EditQre = 1 AND HoProb = 95]*

**HOPROZ**

EDITOR : Back code here - CODE FRAME 47

Does accommodation have any of these problems?

CODE ALL THAT APPLY

- 01 Shortage of space
- 02 Noise from neighbours
- 03 Other street noise, such as traffic, businesses, factories
- 04 Too dark, not enough light
- 05 Pollution, grime or other environmental problems caused by traffic or industry
- 06 Rising damp in floors and walls
- 07 Water getting in from roof, gutters or windows
- 08 Bad condensation problem
- 09 Problems with electrical wiring or plumbing
- 10 General rot and decay
- 11 Problems with insects, mice or rats
- 12 Too cold in winter

- 51 Other - Vandalism including graffiti
- 52 Other - Structural problems eg subsidence, cracks in walls
- 85 Other answer - not codeable 01-12, 51, 52 or 96
- 86 Irrelevant response - not codeable 01-12, 51, 52 or 96
- 95 Other
- 96 None of these

[code maximum 18 out of 18 possible responses]

END FILTER

*IF (HoProb = Other) AND ((EditQre <> Yes) OR (HoProZ = EMPTY OR  
 (HoProZ = Other))) [HoProb = 95 AND EditQre <> 1 OR HoProZ = EMPTY  
 OR HoProZ = 95]*

**HOPROBO**

INTERVIEWER : ENTER OTHER PROBLEMS

String: 40

END FILTER

**HOHAVE**

SHOW CARD G9

At the present time, have any of the following items?

PROBE: What others?

CODE ALL THAT APPLY.

INTERVIEWER: Items that are provided communally may be included.

- 01 Television
- 02 Video recorder
- 03 CD player
- 04 Deep freeze or fridge freezer (exclude fridge only)
- 05 Washing machine
- 06 Tumble Dryer / Washer - Dryer
- 07 Dish washer
- 08 Microwave oven
- 09 Computer
- 10 On-line-digital/Satellite/Cable Television
- 11 Phone (landline)
- 12 DVD player
- 95 All of these
- 96 None of these

[code maximum 12 out of 14 possible responses]

*IF (HoHave = RESPONSE) AND NOT (HoHave = None) [HoHave =  
 RESPONSE AND NOT HoHave = 96]*

**HOHAVB**

SHOW CARD G9

Did buy the item/any of the items you've just mentioned in the last two

years,  
that is since ?  
PROBE: What others?  
CODE ALL THAT APPLY.

INTERVIEWER: Do not code if communally provided.

01  
02  
03  
04  
05  
06  
07  
08  
09  
10  
11  
12  
95  
96

[code maximum 12 out of 14 possible responses]

*IF (HoHavB = 1) OR (HoHavB = All) [HoHavB = 1 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^yourHH = NONRESPONSE [HoHV =  
NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (100, 200, 500, 1000)  
[Bracket results are recorded in **HoHVI**, **HoHVu**, **HoHVe**, **HoHVr**]

END FILTER

END FILTER

*IF (HoHavB = 2) OR (HoHavB = All) [HoHavB = 2 OR HoHavB = 95]*

/ / / /

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^yourHH = NONRESPONSE [HoHV =  
NONRESPONSE]*

/ / / /

**HoHVb**

Was it.....

BRACKETS (75, 100, 300, 750)

[Bracket results are recorded in **HoHVI**, **HoHVu**, **HoHVe**, **HoHVr**]

END FILTER

END FILTER

*IF (HoHavB = 3) OR (HoHavB = All) [HoHavB = 3 OR HoHavB = 95]*

/ / / /

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

| | | | | If items bought as  
 | | | | | combined unit/package e.g. TV and video enter total  
 | | | | | amount once only and code 9997  
 | | | | | for the other items in the package.  
  
 | | | | | Record what was paid, i.e. price after any  
 | | | | | discounts from trade-in  
 | | | | | or money received from selling the old one.  
  
 | | | | | If purchased  
 | | | | | on hp or payments deferred to future collect  
 | | | | | retail price excluding interest on loan etc.  
 | | | | | Range: 0..9997  
  
 | | | | | *IF How much in total did ^yourHH = NONRESPONSE [HoHV =*  
 | | | | | *NONRESPONSE]*  
  
 | | | | | **HoHVb**  
 | | | | | Was it.....  
 | | | | | BRACKETS (75, 150, 300, 500)  
 | | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVR**]  
  
 | | | | | END FILTER  
  
 | | | | | END FILTER  
  
 | | | | | *IF (HoHavB = 4) OR (HoHavB = All) [HoHavB = 4 OR HoHavB = 95]*  
 | | | | |  
  
 | | | | | **HOHV**  
 | | | | | How much in total did pay for the excluding any interest paid on loans?  
  
 | | | | | INTERVIEWER:Write in to nearest £. Accept approximate amount.  
  
 | | | | | If items bought as  
 | | | | | combined unit/package e.g. TV and video enter total  
 | | | | | amount once only and code 9997  
 | | | | | for the other items in the package.  
  
 | | | | | Record what was paid, i.e. price after any  
 | | | | | discounts from trade-in  
 | | | | | or money received from selling the old one.  
  
 | | | | | If purchased  
 | | | | | on hp or payments deferred to future collect  
 | | | | | retail price excluding interest on loan etc.  
 | | | | | Range: 0..9997  
  
 | | | | | *IF How much in total did ^yourHH = NONRESPONSE [HoHV =*  
 | | | | | *NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (75, 150, 300, 500)

[Bracket results are recorded in **HoHVI**, **HoHVu**, **HoHVe**, **HoHVR**]

END FILTER

END FILTER

*IF (HoHavB = 5) OR (HoHavB = All) [HoHavB = 5 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^yourHH = NONRESPONSE [HoHV =  
NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (150, 250, 350, 500)

[Bracket results are recorded in **HoHVI**, **HoHVu**, **HoHVe**, **HoHVR**]

END FILTER

END FILTER

*IF (HoHavB = 6) OR (HoHavB = All) [HoHavB = 6 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^yourHH = NONRESPONSE [HoHV = NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (100, 200, 300, 500)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

END FILTER

END FILTER

*IF (HoHavB = 7) OR (HoHavB = All) [HoHavB = 7 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

| | | | |  
| | | | | IF How much in total did ^yourHH = NONRESPONSE [HoHV =  
| | | | | NONRESPONSE]

| | | | | **HoHVb**

| | | | | Was it.....

| | | | | BRACKETS (150, 250, 350, 500)

| | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | IF (HoHavB = 8) OR (HoHavB = All) [HoHavB = 8 OR HoHavB = 95]

| | | | |

| | | | | **HOHV**

| | | | | How much in total did pay for the excluding any interest paid on loans?

| | | | | INTERVIEWER:Write in to nearest £. Accept approximate amount.

| | | | | If items bought as  
| | | | | combined unit/package e.g. TV and video enter total  
| | | | | amount once only and code 9997  
| | | | | for the other items in the package.

| | | | | Record what was paid, i.e. price after any  
| | | | | discounts from trade-in  
| | | | | or money received from selling the old one.

| | | | | If purchased  
| | | | | on hp or payments deferred to future collect  
| | | | | retail price excluding interest on loan etc.  
| | | | | Range: 0..9997

| | | | | IF How much in total did ^yourHH = NONRESPONSE [HoHV =  
| | | | | NONRESPONSE]

| | | | | **HoHVb**

| | | | | Was it.....

| | | | | BRACKETS (50, 100, 200, 400)

| | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | IF (HoHavB = 9) OR (HoHavB = All) [HoHavB = 9 OR HoHavB = 95]

| | | | |

| | | | |

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^yourHH = NONRESPONSE [HoHV = NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (500, 750, 1000, 2000)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

END FILTER

END FILTER

*IF (HoHavB = 10) OR (HoHavB = All) [HoHavB = 10 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased

on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^yourHH = NONRESPONSE [HoHV[10] =  
NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (500, 750, 1000, 2000)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

END FILTER

END FILTER

*IF (HoHavB = 11) OR (HoHavB = All) [HoHavB = 11 OR HoHavB =  
95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^yourHH = NONRESPONSE [HoHV[11] =  
NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (25, 50, 100, 150)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

END FILTER

END FILTER

| | | | | IF (HoHavB = 12) OR (HoHavB = All) [HoHavB = 12 OR HoHavB =  
/ / / / / 95]

| | | | | **HOHV**

| | | | | How much in total did pay for the excluding any interest paid on loans?

| | | | | INTERVIEWER:Write in to nearest £. Accept approximate amount.

| | | | | If items bought as  
| | | | | combined unit/package e.g. TV and video enter total  
| | | | | amount once only and code 9997  
| | | | | for the other items in the package.

| | | | | Record what was paid, i.e. price after any  
| | | | | discounts from trade-in  
| | | | | or money received from selling the old one.

| | | | | If purchased  
| | | | | on hp or payments deferred to future collect  
| | | | | retail price excluding interest on loan etc.  
| | | | | Range: 0..9997

| | | | | IF How much in total did ^yourHH = NONRESPONSE [HoHV[12] =  
/ / / / / NONRESPONSE]

| | | | | **HoHVb**

| | | | | Was it.....

| | | | | BRACKETS (75, 150, 300, 500)

| | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | END FILTER

| | | | | **HOCO**

| | | | | Now I have some questions about spending on some other common items.

| | | | | INTERVIEWER: Enter 1 to continue

| | | | | Range: 1..1

| | | | | **HOFOOD**

| | | | | First thinking about weekly food bills, approximately how much usually  
| | | | | spend in total on food and groceries - include all food, bread, milk, soft drinks,  
| | | | | etc and meals on wheels; exclude pet food, alcohol, cigarettes, takeaways and  
| | | | | meals out?

INTERVIEWER: Write in to nearest £.

If asked, tell respondent to exclude cleaning products.

Range: 0..9997

*IF (HoFood = DONTKNOW) OR (HoFood = REFUSAL) [HoFood = DONTKNOW OR HoFood = REFUSAL]*

**Hofoodb**  
Is it usually.....  
BRACKETS (30, 50, 75, 150)  
[Bracket results are recorded in **Hofol, Hofou, Hofoe, Hofor**]

END FILTER

**HOOUTF**  
Approximately how much usually spend in a month in total on takeaways and food consumed out of the home - include all food consumed out of the home e.g. restaurants, meals consumed at the workplace etc?

INTERVIEWER: Write in to nearest £.

Range: 0..9997

*IF (HoOutf = DONTKNOW) OR (HoOutf = REFUSAL) [HoOutf = DONTKNOW OR HoOutf = REFUSAL]*

**HoOutfb**  
Is it usually.....  
BRACKETS (30, 50, 150, 500)  
[Bracket results are recorded in **HoOul, HoOuu, HoOue, HoOur**]

END FILTER

**HOMEAL**  
Can I just check, in the last 12 months that is since did (or anyone else in household) ever cut the size of your meals or skip meals because there wasn't enough money for food?  
1 Yes  
2 No

*IF Can I just check, in the last = Yes [HoMeal = 1]*

**HOMOFT**  
Did this happen ... READ OUT ...  
1 ... one or more times per month,  
2 almost every month,  
3 most months but not every month,  
4 or, once or twice in the year?

END FILTER

**HOCL**

The last question about spending is all about how much you actually spent in the last four weeks, whether this was for you or someone else.

Thinking of the last four weeks (since ), approximately how much did spend on clothes, including outerwear, underwear, footwear and accessories?

INTERVIEWER: Write in to nearest £.

Range: 0..9997

*IF The last question about spendi = NONRESPONSE [HoCl = NONRESPONSE]*

**HoClb**

Was it.....

BRACKETS (30, 50, 150, 500)

[Bracket results are recorded in **HoCII, HoClu, HoCle, HoClr**]

END FILTER

**HOCENH**

have any form of central heating in accommodation?

INTERVIEWER: Include storage heaters.

1 Yes

2 No

*IF ^Dodoes[pnum] ^youname[pnum] h = Yes [HoCenH = 1]*

**HOCENP**

Is the central heating fuelled by ...READ OUT...

INTERVIEWER: Code coal, wood etc. as solid fuel.

1 ...mains gas,

2 electricity,

3 solid fuel,

4 oil,

5 or something else?

END FILTER

**HOOHEA**

use any other forms of heating such as ...READ OUT...

CODE ALL THAT APPLY.

INTERVIEWER: Do not include if available in the household but not used.

- 1 ...gas fire,
  - 2 electric fire,
  - 3 paraffin heaters,
  - 4 open fire (log/wood/coal),
  - 95 or something else? (please specify)
  - 96 SPONTANEOUS: No other heating
- [code maximum 5 out of 6 possible responses]

*IF (EditQre = Yes) AND (HoOhea = Other) [EditQre = 1 AND HoOhea = 95]*

**HOOHEZ**

EDITOR : Back code here - CODE FRAME 48  
use any other forms of heating?

CODE ALL THAT APPLY

- 1 Gas fire
- 2 Electric Fire
- 3 Paraffin Heaters
- 4 Open fire (log/wood/coal),
- 85 Other answer - not codeable 01 to 03, 96 or 51
- 86 Irrelevant response - not codeable 01 to 03, 96 or 51
- 95 Other
- 96 No other heating

[code maximum 8 out of 8 possible responses]

END FILTER

*IF (HoOhea = Other) AND ((EditQre <> Yes) OR (HoOHeZ = EMPTY OR (HoOHeZ = Other))) [HoOhea = 95 AND EditQre <> 1 OR HoOHeZ = EMPTY OR HoOHeZ = 95]*

**HOOHEO**

INTERVIEWER: RECORD OTHER TYPE OF HEATING  
String: 60

END FILTER

**HOFUEL**

SHOW CARD G10

Can I just check, which of these do you use in your home,  
either for heating or for any other purpose?

CODE ALL THAT APPLY.

INTERVIEWER: Do not include if available in the household but not used.

- 1 Mains gas
- 2 Electricity
- 3 Coal/Smokeless fuel
- 4 Paraffin/Bottled gas
- 5 Oil
- 6 Wood
- 95 Other source of fuel or power

[code maximum 7 out of 7 possible responses]

*IF (HoFuel = Gas) AND (HoFuel = Elec) [HoFuel = 1 AND HoFuel = 2]*

**HOFSUP**

Do you get your gas and electricity from the same supplier or from different suppliers?

- 1 Same supplier
- 2 Different suppliers

*IF Do you get your gas and electr = Same [HoFSup = 1]*

**HOFTOG**

And do you pay for your gas and electricity together or separately?

- 1 Pay together
- 2 Pay separately

*IF And do you pay for your gas an = Together [HoFTog = 1]*

**HOFPAY**

SHOW CARD G11

Which of these methods do you use to pay for your gas and electricity?

- 1 Direct debit
- 2 Monthly/quarterly bill (including standing orders)
- 3 Pre-payment (key/card or token) meters
- 4 Included in rent
- 5 Frequent cash payment (ie more frequent than once a month)
- 6 Fuel direct/direct from benefits
- 7 Staywarm scheme
- 95 Other

*IF SHOW CARD G11 @/Which of these = DD [HoFPay = 1]*

**HOFD**

Is your gas and electricity direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

*IF Is your gas and electricity di = Monthly [HoFD = 1]*











HoFSr]

END FILTER

IF (HoFuel = Gas) AND NOT (HoFTog = Together) [HoFuel = 1 AND NOT  
HoFTog = 1]

**HOGPAY**

SHOW CARD G11

Which of these methods do you use to pay for your gas?

- 1 Direct debit
- 2 Monthly/quarterly bill (including standing orders)
- 3 Pre-payment (key/card or token) meters
- 4 Included in rent
- 5 Frequent cash payment (ie more frequent than once a month)
- 6 Fuel direct/direct from benefits
- 95 Other

IF SHOW CARD G11 @/Which of these = DD [HoGPay = 1]

**HOGD**

Is your gas direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

IF Is your gas direct debit month = Monthly [HoGD = 1]

**HOGDM**









IF SHOW CARD G11 @/Which of these = DD [HoEPay = 1]

**HOED**

Is your electricity direct debit monthly or quarterly?

- 1 Monthly
- 2 Quarterly

IF Is your electricity direct deb = Monthly [HoED = 1]

**HOEDM**

How much is your monthly direct debit for your electricity?

Range: 0..999

IF How much is your monthly direc = NONRESPONSE [HoEDm =  
NONRESPONSE]

**HoEDmb**

Is it.....

BRACKETS (10, 25, 40, 75)

[Bracket results are recorded in **HoEDI, HoEDu, HoEDe, HoEDr**]

END FILTER

ELSE

IF Is your electricity direct deb = Quarterly [HoED = 2]

**HOEDQ**

How much is your quarterly direct debit for your electricity?

Range: 0..999

IF How much is your quarterly dir = NONRESPONSE [HoEDq =  
NONRESPONSE]

**HoEDqb**

Is it.....

BRACKETS (30, 75, 100, 150)

[Bracket results are recorded in **HoEDI, HoEDu, HoEDe, HoEDr**]

END FILTER

END FILTER

END FILTER

ELSE

IF SHOW CARD G11 @/Which of these = Bill [HoEPay = 2]

**HOEB**

```

| | | | | Is your electricity bill monthly or quarterly?
| | | | | 1 Monthly
| | | | | 2 Quarterly
| | | | |
| | | | | IF Is your electricity bill month = Monthly [HoEB = 1]
| | | | |
| | | | | HOEBMW
| | | | | How much is your monthly electricity bill during winter?
| | | | | Range: 0..999
| | | | |
| | | | | IF How much is your monthly elect = NONRESPONSE
| | | | | [HoEBmw = NONRESPONSE]
| | | | |
| | | | | HoEBmwb
| | | | | Is it.....
| | | | | BRACKETS (10, 25, 40, 75)
| | | | | [Bracket results are recorded in HoEBI, HoEBu, HoEBe, HoEBr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | HOEBMS
| | | | | And how much is your monthly electricity bill during summer?
| | | | | Range: 0..999
| | | | |
| | | | | IF And how much is your monthly e = NONRESPONSE
| | | | | [HoEBms = NONRESPONSE]
| | | | |
| | | | | HoEBmsb
| | | | | Is it.....
| | | | | BRACKETS (10, 25, 40, 75)
| | | | | [Bracket results are recorded in HoEBI, HoEBu, HoEBe, HoEBr]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF Is your electricity bill month = Quarterly [HoEB = 2]
| | | | |
| | | | | HOEBQW
| | | | | How much is your quarterly electricity bill during winter?
| | | | | Range: 0..999
| | | | |
| | | | | IF How much is your quarterly ele = NONRESPONSE
| | | | | [HoEBqw = NONRESPONSE]
| | | | |
| | | | | HoEBqwb
| | | | | Is it.....
| | | | | BRACKETS (30, 75, 100, 150)
| | | | | [Bracket results are recorded in HoEBI, HoEBu, HoEBe, HoEBr]
| | | | |
| | | | | END FILTER

```





| | | | | *NONRESPONSE]*

| | | | | **HoFCwb**

| | | | | Is it.....

| | | | | BRACKETS (5, 15, 30, 50)

| | | | | [Bracket results are recorded in **HoFCI, HoFCu, HoFCe, HoFCr]**

| | | | | END FILTER

| | | | | **HOFCS**

| | | | | And in summer, how much do you spend on coal/smokeless fuel in an average week (to the nearest pound)?

| | | | | INTERVIEWER: If free coal enter zero.

| | | | | Range: 0..99

| | | | | *IF And in summer, how much do = NONRESPONSE [HoFCs =*

| | | | | *NONRESPONSE]*

| | | | | **HoFCsb**

| | | | | Is it.....

| | | | | BRACKETS (5, 15, 30, 50)

| | | | | [Bracket results are recorded in **HoFCI, HoFCu, HoFCe, HoFCr]**

| | | | | END FILTER

| | | | | END FILTER

| | | | | *IF (HoFuel = Elec) AND NOT (HoFTog = Together) [HoFuel = 2 AND*

| | | | | *NOT HoFTog = 1]*

| | | | | **HOFPGW**

| | | | | Now thinking about how much paraffin/bottled gas you use in your home.

| | | | | In winter, how much do you spend on paraffin/bottled gas in an average week (to the nearest pound)?

| | | | | Range: 0..99

| | | | | *IF Now thinking about how much pa = NONRESPONSE [HoFPGw =*

| | | | | *NONRESPONSE]*

| | | | | **HoFpgwb**

| | | | | Is it.....

| | | | | BRACKETS (5, 15, 30, 50)

| | | | | [Bracket results are recorded in **HoFpl, HoFpu, HoFpe, HoFpr]**

| | | | | END FILTER

| | | | | **HOFPGS**

| | | | | And in summer, how much do you spend on paraffin/bottled gas in an average week (to the nearest pound)?

```

| | | | Range: 0..99
| | | | IF And in summer, how much do = NONRESPONSE [HoFPGs =
| | | | NONRESPONSE]
| | | |
| | | | HoFpgsb
| | | | Is it.....
| | | | BRACKETS (5, 15, 30, 50)
| | | | [Bracket results are recorded in HoFpl, HoFpu, HoFpe, HoFpr]
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF (HoFuel = Elec) AND NOT (HoFTog = Together) [HoFuel = 2 AND
| | | | NOT HoFTog = 1]
| | | |
| | | | HOFOW
| | | | Now thinking about how much oil you use in your home. In winter, how
| | | | much do you spend on oil in an average week (to the nearest pound)?
| | | | Range: 0..99
| | | |
| | | | IF Now thinking about how much oi = NONRESPONSE [HoFOIw =
| | | | NONRESPONSE]
| | | |
| | | | HoFoiwb
| | | | Is it.....
| | | | BRACKETS (5, 15, 30, 50)
| | | | [Bracket results are recorded in HoFol, HoFou, HoFoe, HoFor]
| | | |
| | | | END FILTER
| | | |
| | | | HOFOWS
| | | | And in summer, how much do you spend on oil in an average week (to the
| | | | nearest pound)?
| | | | Range: 0..99
| | | |
| | | | IF And in summer, how much do = NONRESPONSE [HoFOIs =
| | | | NONRESPONSE]
| | | |
| | | | HoFoish
| | | | Is it.....
| | | | BRACKETS (5, 15, 30, 50)
| | | | [Bracket results are recorded in HoFol, HoFou, HoFoe, HoFor]
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF (HoFuel = Elec) AND NOT (HoFTog = Together) [HoFuel = 2 AND
| | | | NOT HoFTog = 1]

```

**HOFWW**

Now thinking about how much wood you use in your home. In winter, how much do you spend on wood in an average week (to the nearest pound)?

Range: 0..99

*IF Now thinking about how much wo = NONRESPONSE [HoFWw = NONRESPONSE]*

**HoFwwb**

Is it.....

BRACKETS (5, 15, 30, 50)

[Bracket results are recorded in **HoFwl, HoFwu, HoFwe, HoFwr**]

END FILTER

**HOFWS**

And in summer, how much do you spend on wood in an average week (to the nearest pound)?

Range: 0..99

*IF And in summer, how much do = NONRESPONSE [HoFWs = NONRESPONSE]*

**HoFwsb**

Is it.....

BRACKETS (5, 15, 30, 50)

[Bracket results are recorded in **HoFwl, HoFwu, HoFwe, HoFwr**]

END FILTER

END FILTER

*IF (HoFuel = Elec) AND NOT (HoFTog = Together) [HoFuel = 2 AND NOT HoFTog = 1]*

**HOFUELO**

Which other sources of fuel or power do you use?

String: 50

*IF (HoFuelO = RESPONSE) AND (EditQre = Yes) [HoFuelO = RESPONSE AND EditQre = 1]*

**HOFUELZ**

EDITOR: Back code here. CODE FRAME 49

Can I just check, which of these do you use in your home, either for heating or for any other purpose?

INTERVIEWER: Do not include if available in the household but not used.

- 1 Mains gas
  - 2 Electricity
  - 3 Coal/Smokeless fuel
  - 4 Paraffin/Bottled gas
  - 5 Oil
  - 6 Wood
  - 85 Other answer - not codeable 01-06
  - 86 Irrelevant answer - not codeable 01-06
  - 95 Other
- [code maximum 9 out of 9 possible responses]

END FILTER

**HOFXW**

Now thinking about how much you use in your home.  
 In winter, how much do you spend on in an average week (to the nearest pound)?  
 Range: 0..99

*IF Now thinking about how much ^H = NONRESPONSE [HoFXw = NONRESPONSE]*

**HoFxb**

Is it.....  
 BRACKETS (5, 15, 30, 50)  
 [Bracket results are recorded in **HoFxl**, **HoFxu**, **HoFxe**, **HoFxr**]

END FILTER

**HOFXS**

And in summer, how much do you spend on in an average week (to the nearest pound)?  
 Range: 0..99

*IF And in summer, how much do = NONRESPONSE [HoFXs = NONRESPONSE]*

**HoFxb**

Is it.....  
 BRACKETS (5, 15, 30, 50)  
 [Bracket results are recorded in **HoFxl**, **HoFxu**, **HoFxe**, **HoFxr**]

END FILTER

END FILTER

LOOP FOR k:= 1 TO HFFW.HoVeh

**HOCC**

At the time of last interview, or someone in household owned (or was the main user of) a .C[k].HoVM.

Is that vehicle still owned by you or someone in your household?

- 1 Yes, still has vehicle
- 2 Never had vehicle
- 3 Had similar vehicle but details incorrect
- 4 Vehicle has now changed ownership within the household
- 5 Out of service, sold, given away or keeper no longer in household
- 6 Not read out as didn't make sense

END FILTER

*IF ((NoFOldVeh < 1) OR How many cars, vans or motorbi < 1)) OR How many cars, vans or motorbi = NONRESPONSE [NoFOldVeh < 1 OR HFFW.HoVeh < 1 OR HFFW.HoVeh = NONRESPONSE]*

**HOVEH**

How many cars, vans or motorbikes, if any, or household own (including company, lease or cars owned through motability scheme)?

INTERVIEWER: Include cars owned by people outside the household only if the respondent's

household is the sole or main user of that car.

Exclude company cars if only available for business use.

Range: 0..20

END FILTER

*IF (HoVeh > 0) OR (NoFOldVeh > 0) [HoVeh > 0 OR NoFOldVeh > 0]*

LOOP FOR Idx:= 1 TO 16

*IF (Idx <= (HoVeh + NoFOldVeh)) OR (C[Idx - 1].HoVNew = Yes) [Idx <= HoVeh + NoFOldVeh OR CIdx - 1.HoVNew = Yes]*

*IF Derived: status of vehicle IN [Yes, Change] [HoVSt = 1, 4]*

ELSE

*IF Derived: status of vehicle IN [Similar, NewVeh] [HoVSt = 3, 6]*

**HOVM**

What make and model is the car, van or motorbike?

String: 60

**HOVW**

ASK OR CODE: Is this a car, a van or a motorbike?

- 1 Car
- 2 Van
- 3 Motorbike

**HOVAG**

How old is this ?

INTERVIEWER:Code here how to record the age of the vehicle.

Record

registration year even if bought second hand.

If it has a personalised or

cherished number plate,

record the year the vehicle was registered.

- 1 Answer given in year vehicle was registered
- 2 Answer given in registration letter (Letter at beginning)
- 3 Answer given in registration letter (Letter at the end)
- 4 Answer given in new registration number (Number in middle)

*IF ^PVehDescr @/How old is th = XYear [HoVAg = 1]*

**HOVYR**

INTERVIEWER: Enter the year the vehicle was registered.

Range: 1900..2050

ELSE

*IF ^PVehDescr @/How old is th = Lregist [HoVAg = 2]*

**HOVLR**

INTERVIEWER: Enter the registration letter (the letter at the beginning).

String: 2

ELSE

*IF ^PVehDescr @/How old is th = Eregist [HoVAg = 3]*

**HOVER**

INTERVIEWER: Enter the registration letter (the letter at the end).

String: 2



owns this ?  
PROBE: Who else?

CODE ALL THAT APPLY

- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08
- 09
- 10
- 11
- 12
- 13
- 14
- 15
- 16

- 17 Not a household member
  - 18 Company/employer
  - 19 Lease company, including motability scheme
- [code maximum 4 out of 19 possible responses]

END FILTER

*IF (PSeq >= PLast) AND (HoVeh <> RESPONSE) [PSeq >= PLast  
AND HoVeh <> RESPONSE]*

**HOVNEW**

Are there any (other) vehicles owned by (including company, lease or cars owned through motability scheme)?

INTERVIEWER: Include cars owned by people outside the household only if respondent's household is the sole or main user of that car. Exclude company cars if only available for business use.

- 1 Yes
- 2 No

END FILTER

END FILTER

END FILTER

*IF Any change in number of vehicl = Yes [VehChange = 1]*

**HOVEHX**

Can I just check, in total, how many cars, vans or motorbikes, if any,

own (including company or lease vehicles)?

Range: 0..20

END FILTER

END FILTER

**HOX**

INTERVIEWER: The Housing section is finished.

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

Range: 1..1

END FILTER

*IF (IAskInst = Yes) OR (IAskInst = Yes) [IAskInst = 1 OR IAskInst = 1]*

**HOHAVE**

SHOW CARD G9

At the present time, have any of the following items?

PROBE: What others?

CODE ALL THAT APPLY.

INTERVIEWER: Items that are provided communally may be included.

- 01 Television
- 02 Video recorder
- 03 CD player
- 04 Deep freeze or fridge freezer (exclude fridge only)
- 05 Washing machine
- 06 Tumble Dryer / Washer - Dryer
- 07 Dish washer
- 08 Microwave oven
- 09 Computer
- 10 On-line-digital/Satellite/Cable Television
- 11 Phone (landline)
- 12 DVD player
- 95 All of these
- 96 None of these

[code maximum 12 out of 14 possible responses]

*IF (HoHave = RESPONSE) AND NOT (HoHave = None) [HoHave =  
RESPONSE AND NOT HoHave = 96]*

**HOHAVB**

SHOW CARD G9

Did buy the item/any of the items you've just mentioned in the last two  
years,

that is since ?  
PROBE: What others?  
CODE ALL THAT APPLY.

INTERVIEWER: Do not code if communally provided.

01  
02  
03  
04  
05  
06  
07  
08  
09  
10  
11  
12  
95  
96

[code maximum 12 out of 14 possible responses]

*IF (HoHavB = 1) OR (HoHavB = All) [HoHavB = 1 OR HoHavB = 95]*

/ / / / /

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^YouName = NONRESPONSE [HoHV =  
NONRESPONSE]*

/ / / / /

**HoHVb**

Was it.....

BRACKETS (100, 200, 500, 1000)

| | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | *IF (HoHavB = 2) OR (HoHavB = All) [HoHavB = 2 OR HoHavB = 95]*

| | | | | **HOHV**

| | | | | How much in total did pay for the excluding any interest paid on loans?

| | | | | INTERVIEWER:Write in to nearest £. Accept approximate amount.

| | | | | If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

| | | | | Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

| | | | | If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

| | | | | *IF How much in total did ^YouName = NONRESPONSE [HoHV =  
NONRESPONSE]*

| | | | | **HoHVb**

| | | | | Was it.....

| | | | | BRACKETS (75, 100, 300, 750)

| | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | *IF (HoHavB = 3) OR (HoHavB = All) [HoHavB = 3 OR HoHavB = 95]*

| | | | | **HOHV**

| | | | | How much in total did pay for the excluding any interest paid on loans?

| | | | | INTERVIEWER:Write in to nearest £. Accept approximate amount.

| | | | | If items bought as

```

| | | | | combined unit/package e.g. TV and video enter total
| | | | | amount once only and code 9997
| | | | | for the other items in the package.
|
| | | | | Record what was paid, i.e. price after any
| | | | | discounts from trade-in
| | | | | or money received from selling the old one.
|
| | | | | If purchased
| | | | | on hp or payments deferred to future collect
| | | | | retail price excluding interest on loan etc.
| | | | | Range: 0..9997
|
| | | | | IF How much in total did ^YouName = NONRESPONSE [HoHV =
| | | | | NONRESPONSE]
|
| | | | | HoHVb
| | | | | Was it.....
| | | | | BRACKETS (75, 150, 300, 500)
| | | | | [Bracket results are recorded in HoHVI, HoHVu, HoHVe, HoHVR]
|
| | | | | END FILTER
|
| | | | | END FILTER
|
| | | | | IF (HoHavB = 4) OR (HoHavB = All) [HoHavB = 4 OR HoHavB = 95]
| | | | |
|
| | | | | HOHV
| | | | | How much in total did pay for the excluding any interest paid on loans?
|
| | | | | INTERVIEWER:Write in to nearest £. Accept approximate amount.
|
| | | | | If items bought as
| | | | | combined unit/package e.g. TV and video enter total
| | | | | amount once only and code 9997
| | | | | for the other items in the package.
|
| | | | | Record what was paid, i.e. price after any
| | | | | discounts from trade-in
| | | | | or money received from selling the old one.
|
| | | | | If purchased
| | | | | on hp or payments deferred to future collect
| | | | | retail price excluding interest on loan etc.
| | | | | Range: 0..9997
|
| | | | | IF How much in total did ^YouName = NONRESPONSE [HoHV =
| | | | | NONRESPONSE]
| | | | |
|

```

**HoHVb**

Was it.....

BRACKETS (75, 150, 300, 500)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

END FILTER

END FILTER

*IF (HoHavB = 5) OR (HoHavB = All) [HoHavB = 5 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^YouName = NONRESPONSE [HoHV =  
NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (150, 250, 350, 500)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

END FILTER

END FILTER

*IF (HoHavB = 6) OR (HoHavB = All) [HoHavB = 6 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^YouName = NONRESPONSE [HoHV = NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (100, 200, 300, 500)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVR**]

END FILTER

END FILTER

*IF (HoHavB = 7) OR (HoHavB = All) [HoHavB = 7 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

| | | | | IF How much in total did ^YouName = NONRESPONSE [HoHV =  
/ / / / / NONRESPONSE]

| | | | | **HoHVb**

| | | | | Was it.....

| | | | | BRACKETS (150, 250, 350, 500)

| | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | IF (HoHavB = 8) OR (HoHavB = All) [HoHavB = 8 OR HoHavB = 95]  
/ / / / /

| | | | | **HOHV**

| | | | | How much in total did pay for the excluding any interest paid on loans?

| | | | | INTERVIEWER:Write in to nearest £. Accept approximate amount.

| | | | | If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

| | | | | Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

| | | | | If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

| | | | | IF How much in total did ^YouName = NONRESPONSE [HoHV =  
/ / / / / NONRESPONSE]

| | | | | **HoHVb**

| | | | | Was it.....

| | | | | BRACKETS (50, 100, 200, 400)

| | | | | [Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

| | | | | END FILTER

| | | | | END FILTER

| | | | | IF (HoHavB = 9) OR (HoHavB = All) [HoHavB = 9 OR HoHavB = 95]  
/ / / / /

| | | | | **HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^YouName = NONRESPONSE [HoHV = NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (500, 750, 1000, 2000)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVR**]

END FILTER

END FILTER

*IF (HoHavB = 10) OR (HoHavB = All) [HoHavB = 10 OR HoHavB = 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as combined unit/package e.g. TV and video enter total amount once only and code 9997 for the other items in the package.

Record what was paid, i.e. price after any discounts from trade-in or money received from selling the old one.

If purchased on hp or payments deferred to future collect

retail price excluding interest on loan etc.  
Range: 0..9997  
  
*IF How much in total did ^YouName = NONRESPONSE [HoHV[10]*  
*/ / / / / = NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (500, 750, 1000, 2000)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVR**]

END FILTER

END FILTER

*IF (HoHavB = 11) OR (HoHavB = All) [HoHavB = 11 OR HoHavB =*  
*/ / / / / 95]*

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER:Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^YouName = NONRESPONSE [HoHV[11]*  
*/ / / / / = NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (25, 50, 100, 150)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVR**]

END FILTER

END FILTER

*IF (HoHavB = 12) OR (HoHavB = All) [HoHavB = 12 OR HoHavB =*

||| | 95]

**HOHV**

How much in total did pay for the excluding any interest paid on loans?

INTERVIEWER: Write in to nearest £. Accept approximate amount.

If items bought as  
combined unit/package e.g. TV and video enter total  
amount once only and code 9997  
for the other items in the package.

Record what was paid, i.e. price after any  
discounts from trade-in  
or money received from selling the old one.

If purchased  
on hp or payments deferred to future collect  
retail price excluding interest on loan etc.  
Range: 0..9997

*IF How much in total did ^YouName = NONRESPONSE [HoHV[12]  
= NONRESPONSE]*

**HoHVb**

Was it.....

BRACKETS (75, 150, 300, 500)

[Bracket results are recorded in **HoHVI, HoHVu, HoHVe, HoHVr**]

END FILTER

END FILTER

END FILTER

**HOCO**

Now I have some questions about spending on some other common items.

INTERVIEWER: Enter 1 to continue

Range: 1..1

**HOOUTF**

Approximately how much usually spend in a month in total on takeaways  
and food consumed out of the home - include all food consumed out of the  
home e.g. restaurants, meals consumed at the workplace etc?

INTERVIEWER: Write in to nearest £.

```

| | | | Range: 0..9997
| | | | IF (HoOutf = DONTKNOW) OR (HoOutf = REFUSAL) [HoOutf =
| | | | DONTKNOW OR HoOutf = REFUSAL]
| | | |
| | | | HoOutfb
| | | | Is it usually.....
| | | | BRACKETS (30, 50, 150, 500)
| | | | [Bracket results are recorded in HoOul, HoOuu, HoOue, HoOur]
| | | |
| | | | END FILTER

| | | | HOCL
| | | | The last question about spending is all about how much actually spent in the
| | | | last four weeks, whether this was for or someone else.
| | | |
| | | | Thinking of the last four weeks (since ), approximately how much did spend
| | | | on clothes, including outerwear, underwear, footwear and accessories?
| | | |
| | | | INTERVIEWER:Write in to nearest £.
| | | | Range: 0..9997
| | | |
| | | | IF The last question about spendi = NONRESPONSE [HoCl =
| | | | NONRESPONSE]
| | | |
| | | | HoClb
| | | | Was it.....
| | | | BRACKETS (30, 50, 150, 500)
| | | | [Bracket results are recorded in HoCII, HoClu, HoCle, HoClr]
| | | |
| | | | END FILTER

| | | | HOVEH
| | | | How many cars, vans or motorbikes, if any, own including company, lease or
| | | | cars owned through the motability scheme?
| | | | Range: 0..20
| | | |
| | | | IF How many cars, vans or motorbi > 0 [HoVeh > 0]
| | | |
| | | | LOOP FOR Idx:= 1 TO 16
| | | |
| | | | IF Idx <= How many cars, vans or motorbi [Idx <= HoVeh]
| | | |
| | | | HOVM
| | | | What make and model is the car, van or motorbike?
| | | | String: 60
| | | |
| | | | HOVW
| | | | ASK OR CODE: Is this a car, a van or a motorbike?
| | | | 1 Car

```

- 2 Van
- 3 Motorbike

**HOVAG**

How old is this ?

INTERVIEWER: Code here how to record the age of the vehicle.  
Record registration  
year even if bought second hand.  
If it has a personalised or cherished number plate,

record the year the vehicle was registered.

- 1 Answer given in year vehicle was registered
- 2 Answer given in registration letter (Letter at beginning)
- 3 Answer given in registration letter (Letter at the end)
- 4 Answer given in new registration number (Number in middle)

*IF How old is this ^carvan? @/@/ = XYear [HoVAg = 1]*

**HOVYR**

INTERVIEWER: Enter the year the vehicle was registered.  
Range: 1900..2050

ELSE

*IF How old is this ^carvan? @/@/ = Lregist [HoVAg = 2]*

**HOVLR**

INTERVIEWER: Enter the registration letter (the letter at the beginning).  
String: 2

ELSE

*IF How old is this ^carvan? @/@/ = Eregist [HoVAg = 3]*

**HOVER**

INTERVIEWER: Enter the registration letter (the letter at the end).  
String: 2

ELSE

*IF How old is this ^carvan? @/@/ = RegNum [HoVAg = 4]*

**HOVNR**

INTERVIEWER: Code the new registration number (the number in

the

middle).

- 1 51
- 2 02
- 3 52
- 4 03
- 5 53
- 95 Other

IF INTERVIEWER: Code the new regi = Other [HoVNr = 95]

**HOVNO**

INTERVIEWER: Enter the other new registration number.  
Range: 0..99

END FILTER

**WHOSO**

INTERVIEWER: Was there anyone other than you and the respondent(s) in the room during the interview so far?

- 1 No
  - 2 Yes - respondent's spouse or partner
  - 3 Yes - other household member (adult)
  - 4 Yes - other household member (child)
  - 5 Not a household member
- [code maximum 4 out of 5 possible responses]

IF MMStarted[IndNo] = No [MMStarted[IndNo] = No]

**REMINDB**

INTERVIEWER: Do you wish to do the Walking Test now?

- To enter the measurements  
questionnaire, press <Ctrl Enter>.

- Else, press <Enter> to continue.  
Range: 1..1

END FILTER

**SCINTA**

I would now like to ask each of you some questions on your own.

While answers these questions I would like to leave the room and complete a short paper questionnaire. When has finished I'll ask to come back in and we can swap over so that does the paper questionnaire and answers the questions on own.

INTERVIEWER: Give BLUE self completion to and ask to leave the room.

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

**COGNITIVE FUNCTION  
MODULE  
(CF)**

**CFINTA**

In the next section of the interview, we will do some memory and concentration tasks and I will ask about your expectations for the future and how you feel now.

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

**CFMETM MEMORY RATING AT PRESENT TIME**

Part of this study is concerned with people's memory. How would you rate your memory at the present time?

Would you say it is ...READ OUT...

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

**CFMETMT MEMORY COMPARED TO TWO YEARS AGO**

Compared to two years ago, would you say your memory is ...READ OUT...

- 1 better now,
- 2 about the same,
- 3 or worse now than it was then?

**CFINT**

Now we will do the memory and concentration tasks.

Some of them may seem rather easy but others are more difficult so please listen carefully.

The tasks are designed so no-one gets the highest score possible.

Please just do the best you can on all of them.

INTERVIEWER: Before starting the tests, make sure respondent has glasses etc if needed.

Press  
<1> and <Enter> to continue.

Range: 1..1

**CFDATD WHETHER CORRECT DATE GIVEN**

Please tell me today's date.

INTERVIEWER: Code whether the day of month () is given correctly.

- 1 Day of month given correctly
- 2 Day of month given incorrectly or doesn't know day

**CFDATM WHETHER CORRECT MONTH GIVEN**

INTERVIEWER: Code whether the month () is given correctly.

- 1 Month given correctly
- 2 Month given incorrectly or doesn't know month

**CFDATY** WHETHER CORRECT YEAR GIVEN

INTERVIEWER: Code whether the year () is given correctly.

- 1 Year given correctly
- 2 Year given incorrectly or doesn't know year

**CFDAY** WHETHER CORRECT DAY GIVEN

And please tell me what day of the week it is today?

CORRECT ANSWER:

- 1 Day of week given correctly
- 2 Day of week given incorrectly or doesn't know day

**CFPROM**

Now I would like you to remember to do a task in order to assess everyday memory. At some point during the interview I will hand you this clipboard and a pencil.

(

INTERVIEWER: Show respondent the clipboard).

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

INTERVIEWER: If 'No' explain further.

Is the respondent able to do this task?

- 1 Yes
- 2 No, because is blind or has poor eyesight
- 3 No, because is unable to use pen
- 95 No, for other reason (please specify)

*IF Now I would like you to rememb = Other [CfProM = 95]*

**CFPROMO**

Give details of other reason

String: 80

END FILTER

**CFLSINT**

For the next task the computer will 'read' a list of words which I will ask you to recall.

First I'd like to check that you will be able to hear the computer voice

- please listen to this short message.

INTERVIEWER: Press <1> and <Enter> to activate the test message.

Range: 1..1

**CFTEST HOW LIST READ OUT**

INTERVIEWER: If the respondent cannot hear properly, adjust the volume on the laptop, then go

back to the previous question and press <Enter> to play the test message again.

INTERVIEWER: If the respondent still cannot hear properly, code that you will read out the

list yourself.

- 1 List read out by computer
- 2 List read out by interviewer

*IF how list read out = listint [CfTest = 2]*

**CFLISST INSTRUCTIONS FOR WORD LIST TASK WHEN READ OUT BY INTERVIEWER**

I will now read a set of 10 words. I would like you to recall as many as you can. We have purposely made the list long so it will be difficult for anyone to recall all the words. Most people recall just a few. Please listen carefully to the set of words as they cannot be repeated.

When I have finished, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

INTERVIEWER: If no, explain further.  
Read out word list below at a slow steady rate approximately one word every 2 seconds.

After word list has been read out press 1 and <Enter>.  
Range: 1..1

END FILTER

*IF how list read out = listcomp [CfTest = 1]*

**CFLIS INSTRUCTIONS FOR WORD LIST TASK WHEN READ OUT BY COMPUTER**

The computer will now read a set of 10 words. I would like you to recall as many as you can. We have purposely made the list long so it will be difficult for anyone to recall all the words. Most people recall just a few.

Please listen carefully to the set of words as they cannot be repeated. When it has finished, I will ask you to recall aloud as many of the words as you can, in any order. Is this clear?

INTERVIEWER: If no, explain further.  
If yes, press <Enter> to begin test and have booklet ready.  
Range: 1..1

*IF word list used for respondent = 1 [CfWrds = 1]*

**CFSNDA WORD LIST A**

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

Range: 1..1

ELSE

*IF word list used for respondent = 2 [CfWrds = 2]*

**CFSNDB WORD LIST B**

INTERVIEWER: After the word list has been read out press 1 and <Enter>.

Range: 1..1

ELSE

*IF word list used for respondent = 3 [CfWrds = 3]*

**CFSNDC WORD LIST C**

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

Range: 1..1

ELSE

*IF word list used for respondent = 4 [CfWrds = 4]*

**CFSNDD WORD LIST D**

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

Range: 1..1

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

**CFLISEN** NUMBER OF WORDS CORRECTLY RECALLED

Now please tell me the words you can recall.

INTERVIEWER: Write the words in the booklet provided.

Allow as much time as the respondent wishes, up to 2 minutes.

Enter the number of words the respondent correctly recalls.

Range: 0..10

**CFANIST**

Now I would like you to name as many different animals as you can think of.

You have one minute to do this.

The computer voice will tell you when to stop.

Ready, go!

INTERVIEWER: Only if the participant asks for clarification, explain that animals include birds, insects, fish etc.

INTERVIEWER: Press <1> and <Enter> as you say 'go!'.

Range: 1..1

**CFANI** NUMBER OF ANIMALS MENTIONED

INTERVIEWER: Write animals mentioned in booklet provided.

Enter the number of different animals mentioned.

See help <F9> for rules about what animals to include.

Range: 0..100

*IF Now I would like you to rememb = Yes [CfProM = 1]*

**CFMEM** WHETHER PROMPT GIVEN TO RESPONDENT FOR PROSPECTIVE MEMORY TEST

INTERVIEWER: Attach booklet (open to the letter cancellation page) to the clipboard and hand

to the respondent along with a pencil and say:

'These are for you.'

INTERVIEWER:

Pause for exactly 5 seconds. If no response, prompt:

'You were going to do something when I gave you the clipboard and pencil.

Can you remember what it was?'

INTERVIEWER: If respondent says 'Am I supposed to....?' then say: 'Do whatever you think

you are supposed to.'

INTERVIEWER: Code whether or not you prompted respondent.

- 1 No prompt given
- 2 Prompt given

### **CFLET**

#### LETTER CANCELLATION PAGE

The next task is a measure of how rapidly you can do something. In a moment I will ask you to work through this list as quickly as you can crossing out all the P's and W's.

Start at the top left hand corner where the arrow is and work along the line. Then go to the beginning of the next line and work along the line again as if you were reading a page. Carry on this way crossing out all the P's and W's with one mark of pencil as in the example at the top of the page.

Please work as quickly and as accurately as you can. The computer voice will tell you when to stop.

When you are told to stop, underline the last letter on which you finish.

Is this clear? (

INTERVIEWER: If no, explain further.)

You may begin now.

INTERVIEWER: Press

<1> and <Enter> as you say 'now'.

Range: 1..1

### **CFLETEN**

INTERVIEWER: As soon as the computer says 'stop now', say:

Please underline the letter  
on which you finished.

INTERVIEWER: Now take back the booklet and clipboard.

Was the respondent able to do the letter cancellation task?

- 1 Yes
- 2 No, because has reading problems
- 95 No, for other reason (please specify)

*IF INTERVIEWER: As soon as the co = Other [CfLetEn = 95]*

**CFLETEO**

INTERVIEWER: Give details of other reason.

String: 80

END FILTER

**CFMEMS WHAT RESPONDENT DID WITH CLIPBOARD**

INTERVIEWER: Code what respondent did when you handed them the clipboard  
and pencil.

- 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

END FILTER

**CFLISD NUMBER OF WORDS RECALLED AFTER DELAY**

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

INTERVIEWER: Write the words in the booklet provided.

Allow as much time as the respondent  
wishes, up to 2 minutes.

Enter the number of words the respondent correctly recalls.

Range: 0..10

**CFWHO WHETHER ANYONE ELSE WAS PRESENT**

INTERVIEWER: Was there anyone other than you and the respondent in the room  
while you were

conducting the cognitive function tests?

- 1 No
  - 2 Yes - respondent's spouse or partner
  - 3 Yes - other household member (adult)
  - 4 Yes - other household member (child)
  - 5 Yes - not a household member
- [code maximum 4 out of 5 possible responses]

**CFIMP** WHETHER OTHER FACTORS IMPAIRED PERFORMANCE

INTERVIEWER: Were there any factors that may have impaired the respondent's performance on

one or more tests?

- 1 Yes
- 2 No

*IF whether other factors impaired performance = Yes [CfImp = 1]*

**CFWHATI** FACTORS WHICH IMPAIRED PERFORMANCE

INTERVIEWER: What factors may have impaired the respondent's performance?

CODE ALL THAT APPLY.

- 01 Blind or poor eyesight
- 02 Deaf or hard of hearing
- 03 Too tired
- 04 Has other illness or physical impairment that affects ability to perform test
- 05 Impaired concentration
- 06 Very nervous or anxious
- 07 Has other mental impairment
- 08 Interruption or distraction - eg phone call or visitor
- 09 Noisy environment
- 10 Problems with the laptop
- 11 Has difficulty understanding English
- 95 Other answer (SPECIFY)

[code maximum 12 out of 12 possible responses]

*IF (EditQre = Yes) AND (CfWhatI = Other) [EditQre = 1 AND CfWhatI = 95]*

**CFWHATZ** FACTORS WHICH IMPAIRED PERFORMANCE

EDITOR: CODE FRAME 32

CFWhat : [^other factors which impaired performance]

- 01 Blind or poor eyesight
- 02 Deaf or hard of hearing
- 03 Too tired
- 04 Has other illness or physical impairment that affects ability to perform test
- 05 Impaired concentration
- 06 Very nervous or anxious
- 07 Has other mental impairment

| | | | 08 Interruption or distraction - eg phone call or visitor  
| | | | 09 Noisy environment  
| | | | 10 Problems with the laptop  
| | | | 11 Has difficulty understanding English  
| | | | 85 Other answer - not codeable 01 to 11  
| | | | 86 Irrelevant response - not codeable 01 to 11  
| | | | [code maximum 13 out of 13 possible responses]

| | | | END FILTER

| | | | *IF (CfWhatI = Other) AND ((EditQre <> Yes) OR factors which impaired*  
| | | | *performance = EMPTY) [CfWhatI = 95 AND EditQre <> 1 OR CfWhatZ =*  
| | | | *EMPTY]*

| | | | **CFWHATO** OTHER FACTORS WHICH IMPAIRED PERFORMANCE

| | | | INTERVIEWER: Give details of other factor that may have impaired the  
respondent's

| | | | performance.

| | | | String: 80

| | | | END FILTER

| | | | END FILTER

| | | | **CFTSET**

| | | | INTERVIEWER: The Cognitive Function section is finished.

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

| | | | Range: 1..1

# **EXPECTATIONS MODULE (EX)**

**EXEVRT** CHANCES AN EVENT MAY HAPPEN

SHOW CARD H1

Now I have some questions about how likely you think various events might be.

When I ask a question I'd like you to give me a number from 0 to 100, where 0 means that you think there is absolutely no chance an event will happen, and 100 means that you think the event is absolutely certain to happen.

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

**EXRAIN** CHANCES IT WILL BE RAINY TOMORROW

SHOW CARD H1

Let's try an example and start with the weather. What do you think the chances are it will be rainy tomorrow?

(Where 100 means a 100 percent chance of rainy weather and you can say any number from 0 to 100. For example, if you think there is a good chance that it will be rainy tomorrow, you might say there is an 80 percent chance of rain.)

Range: 0..100

**EXLO80** CHANCES OF LIVING TO BE 75/80/85/90/95/100/105/110/120

SHOW CARD H1

What are the chances that you will live to be or more?

Range: 0..100

*IF (IAgeOf < 70) AND (ExLo80 <> 0) [IAgeOf < 70 AND ExLo80 <> 0]*

**EXLO90** CHANCES OF LIVING TO BE 85 OR MORE

SHOW CARD H1

What are the chances that you will live to be 85 or more?

Range: 0..100

END FILTER

*IF ((ISex = female) AND (IAgeOf < 60)) OR ((ISex = male) AND (IAgeOf < 65)) [ISex[spno] = female AND IAgeOf < 60 OR ISex[spno] = male AND IAgeOf < 65]*

**EXPW** CHANCES OF WORKING AFTER REACHING AGE 55, 60, AND 65

```

| | | | SHOW CARD H1
| | | |
| | | | Thinking about paid work in general, what are the chances that you will be
| | | | working after you reach age ?
| | | | Range: 0..100
| | | |
| | | | IF (ExpPW > 0) OR (ExpPW = DONTKNOW) [ExpPW > 0 OR ExpPW =
| | | | DONTKNOW]
| | | |
| | | | EXPWF CHANCES OF WORKING 35 HOURS A WEEK, THAT IS WORKING
FULL TIME AFTER REACHING AGE 55, 60, AND 65
| | | |
| | | | SHOW CARD H1
| | | |
| | | | If you were doing any paid work after you reached age , what are the
| | | | chances that this would be for 35 hours a week or more, that is, full-time?
| | | | Range: 0..100
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF ((QWP1.QWPA.Qre.WpAct = paidw) OR (QWP1.QWPA.Qre.WpAct =
| | | | Sempl)) OR (QWP1.QWPA.Qre.WpAway = tempa) [QWP1.QWPA.Qre.WpAct
| | | | = paidw OR QWP1.QWPA.Qre.WpAct = Sempl OR
| | | | QWP1.QWPA.Qre.WpAway = tempa]
| | | |
| | | | IF QInd.IAgeOf < 65 [IAgeOf < 65]
| | | |
| | | | EXHLIM CHANCES THAT ONE'S HEALTH WILL LIMIT ONE'S ABILITY TO
WORK BEFORE REACHING AGE 65
| | | |
| | | | SHOW CARD H1
| | | |
| | | | What are the chances that your health will limit your ability to work before
| | | | you reach age 65?
| | | | Range: 0..100
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | EXRSLF CHANCES OF NOT HAVING ENOUGH FINANCIAL RESOURCES TO
MEET ONE'S NEEDS AT SOME POINT IN THE FUTURE
| | | |
| | | | SHOW CARD H1
| | | |

```

What are the chances that at some point in the future you will not have enough financial resources to meet your needs?

Range: 0..100

*IF QInd.IAgeOf < 75 [IAgeOf < 75]*

**EXAINH** CHANCES OF RECEIVING ANY INHERITANCE, INCLUDING PROPERTY AND VALUABLES, DURING THE NEXT 10 YEARS

SHOW CARD H1

Including property and valuables, what are the chances that you will receive any inheritance during the next 10 years?

Range: 0..100

*IF (ExAInh > 0) OR (ExAInh = DONTKNOW) [ExAInh > 0 OR ExAInh = DONTKNOW]*

**EXCINH** CHANCES OF RECEIVING AN INHERITANCE TOTALLING £10,000 OR MORE DURING THE NEXT 10 YEARS

SHOW CARD H1

What are the chances that you will receive an inheritance totalling £10,000 or more during the next 10 years?

Range: 0..100

*IF (ExCinh = DONTKNOW) OR (ExCinh > 0) [ExCinh = DONTKNOW OR ExCinh > 0]*

**EXINHE** CHANCES OF RECEIVING AN INHERITANCE TOTALLING £100,000 OR MORE IN THE NEXT 10 YEARS

SHOW CARD H1

What are the chances that you will receive an inheritance totalling £100,000 or more during the next 10 years?

Range: 0..100

END FILTER

END FILTER

END FILTER

**EXCIN** CHANCES FOR INTERVIEWEE AND PARTNER LEAVING AN INHERITANCE, INCLUDING PROPERTY AND OTHER VALUABLES, TOTALLING

£50,000 OR MORE

SHOW CARD H1

Including property and other valuables that you might own, what are the chances that you will leave an inheritance totalling £50,000 or more?

Range: 0..100

*IF ((ExCin = RESPONSE) AND (ExCin = 0)) OR (ExCin = DONTKNOW)*

*[ExCin = RESPONSE AND ExCin = 0 OR ExCin = DONTKNOW]*

**EXCAIN** CHANCES THAT INTERVIEWEE AND PARTNER WILL LEAVE ANY INHERITANCE

SHOW CARD H1

What are the chances that you will leave any inheritance?

Range: 0..100

END FILTER

*IF chances for interviewee and partner leaving an inheritance, including*

*property and other valuables, totalling £50,000 or more > 0 [ExCin > 0]*

**EXCPIN** CHANCES THAT INTERVIEWEE AND PARTNER WILL LEAVE AN INHERITANCE TOTALLING £150,000 OR MORE

SHOW CARD H1

What are the chances that you will leave an inheritance totalling £150,000 or more?

Range: 0..100

END FILTER

*IF ((HFFW.HoTenu IN [Own, Buymortg, ShOwnsh]) AND (QHD.DhSameH*

*= Yes)) OR (QHo.HoTenu IN [Own, Buymortg, ShOwnsh]) [HFFW.HoTenu = 1,*

*2, 3 AND QHD.DhSameH = 1 OR QHo.HoTenu = Own, Buymortg, ShOwnsh]*

*IF Is this an institutional respo <> Yes [IAskInst <> Yes]*

**EXHVA** CHANCES THAT THE VALUE OF THE INTERVIEWEE'S HOUSE WILL INCREASE/DECREASE BY MORE THAN 5%/10% OVER THE NEXT YEAR

SHOW CARD H1

What are the chances that the value of your house will by more than over the next year?

INTERVIEWER: Code 997 if respondent does not own their house.  
Range: 0..997

END FILTER

END FILTER

**EXRELA** FREQUENCY OF HAVING TOO LITTLE MONEY TO SPEND ON WHAT THE INTERVIEWEE FEELS HIS/HER NEEDS ARE

SHOW CARD H2

Looking at this card, please say how often you find you have too little money to spend on what you feel needs are?

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Most of the time

**EXRELB** QUALITY OF HOUSEHOLD COMPARED TO OTHER PEOPLE'S LIVING AROUND

SHOW CARD H3

How does your household's financial situation compare with other people living around here? (Would you say your household is...)

- 1 Much worse off
- 2 A bit worse off
- 3 About the same
- 4 A bit better off, or
- 5 Much better off

**EXRELC** FINANCIAL SITUATION COMPARED TO FRIENDS

SHOW CARD H3

And how does your financial situation compare with most of your friends? (Would you say ...)

- 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

*IF QWP1.QWPA.Qre.WPActW IN [paidw, tempaway]  
/ / / [QWP1.QWPA.Qre.WPActW = paidw, tempaway]*

**EXRELD** FINANCIAL SITUATION COMPARED TO MOST OF THE COLLEAGUES

SHOW CARD H3

And how does your financial situation compare to most of your close work colleagues? (Would you say your household is...)

- 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

END FILTER

**EXRELE** THINGS INTERVIEWEE IS NOT ABLE TO DO BECAUSE OF HAVING TOO LITTLE MONEY

SHOW CARD H4

Does having too little money stop you from doing any of the following things?

INTERVIEWER: Code all that apply.

- 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

[code maximum 10 out of 10 possible responses]

**EXTSET**

INTERVIEWER: The Expectations section is finished.

Please enter 1 here to make the program

| | | store the current time and date.  
| | | Range: 1..1  
| | |

**EFFORT AND REWARD**  
**(of caring and voluntary work)**  
**MODULE**  
**(ER)**

| | | IF ((QWP1.QWPA.Qre.WpAct = VolWork) OR (QWP1.QWPA.Qre.WpVW  
| | | <> never)) OR (QWP1.QWPA.Qre.WpAct = Caring) [QWP1.QWPA.Qre  
| | | [1].WpAct = 3 OR QWP1.QWPA.Qre[1].WpVW <> 6 OR QWP1.QWPA.Qre  
| | | [1].WpAct = 4]

| | | **ERVOLCAR**

| | | Earlier in the interview you told me that you had .

| | | INTERVIEWER: Press <1> and <Enter> to continue.

| | | Range: 1..1

| | | **ERCAA** WHETHER LOOKED AFTER ANYONE IN PAST WEEK

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

| | | INTERVIEWER: By 'look after' we mean the active provision of care.

| | | 1 Yes

| | | 2 No

| | | IF whether looked after anyone in past week = Yes [ErCAA = 1]

| | | **ERCAB** RELATIONSHIP TO PERSON/PEOPLE

| | | What relation is this person or people to you?

| | | CODE ALL THAT APPLY.

| | | 1 Spouse or partner

| | | 2 Child

| | | 3 Grandchild

| | | 4 Parent

| | | 5 Parent in law

| | | 6 Other relative

| | | 7 Friend or neighbour

| | | 95 Other

| | | [code maximum 8 out of 8 possible responses]

| | | IF (EditQre = Yes) AND (ErCAB = other) [EditQre = 1 AND ErCAB =

| | | 95]

| | | **ERCABZ** RELATION TO PERSON/PEOPLE

| | | EDITOR : Back code here - CODE FRAME 4

| | | What relation is this person or people to you?

| | | 01 Spouse or partner

| | | 02 Child

| | | 03 Grandchild

| | | 04 Parent

```

| | | | | 05 Parent in law
| | | | | 06 Other relative
| | | | | 07 Friend or neighbour
| | | | | 85 Other answer - not codeable 01 to 07
| | | | | 86 Irrelevant response - not codeable 01 to 07
| | | | | 95 other
| | | | | [code maximum 10 out of 10 possible responses]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (ErCAB = other) AND ((EditQre <> Yes) OR (ErCABZ = EMPTY
| | | | | OR (ErCABZ = other))) [ErCAB = 95 AND EditQre <> 1 OR ErCABZ =
| | | | | EMPTY OR ErCABZ = 95]
| | | | |
| | | | | ERCAX DETAILS OF OTHER PERSON CARED FOR
| | | | |
| | | | | INTERVIEWER: Enter details of other person(s) who they cared for.
| | | | | String: 60
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF relationship to person/people = RESPONSE [ErCAB =
| | | | | RESPONSE]
| | | | |
| | | | | LOOP FOR idx:= 1 TO 8
| | | | |
| | | | | |
| | | | | | IF idx = 1 [idx = 1]
| | | | | |
| | | | | | ELSE
| | | | | |
| | | | | | ERCABNUM NUMBER PEOPLE LOOKED AFTER IN PAST WEEK
| | | | | | How many did you look after in the past week?
| | | | | | Range: 0..99
| | | | | |
| | | | | | END FILTER
| | | | | |
| | | | | | ELSE
| | | | | |
| | | | | | IF (idx = 8) AND (ErCAB = 95) [idx = 8 AND ErCAB = 95]
| | | | | |
| | | | | | ERCABNUM NUMBER PEOPLE LOOKED AFTER IN PAST WEEK
| | | | | | How many did you look after in the past week?
| | | | | | Range: 0..99
| | | | | |
| | | | | | END FILTER
| | | | | |
| | | | | | END FILTER

```



SHOW CARD I1

For which of the reasons given on this card, if any, did you care for someone last week?

CODE ALL THAT APPLY.

- 01 To meet other people
- 02 To contribute something useful
- 03 For personal achievement
- 04 Because I am needed
- 05 To earn money
- 06 Because I enjoy it
- 07 To use my skills
- 08 To keep fit
- 09 Because I feel obliged to do it
- 96 None of these

[code maximum 10 out of 10 possible responses]

END FILTER

END FILTER

*IF (QWP1.QWPA.Qre.WpAct = VolWork) OR (QWP1.QWPA.Qre.WpVW  
/<> never) [QWP1.QWPA.Qre.WpAct = VolWork OR  
QWP1.QWPA.Qre.WpVW <> never]*

**ERVOLINT**

I would now like to ask you about voluntary work.

INTERVIEWER: Press <1> and <Enter> to continue.  
Range: 1..1

**ERMOTIV REASONS FOR DOING VOLUNTARY WORK**  
SHOW CARD I1

For which of the reasons given on this card, if any, do you do voluntary work?

INTERVIEWER: CODE ALL THAT APPLY.

- 01 To meet other people
- 02 To contribute something useful
- 03 For personal achievement
- 04 Because I am needed
- 05 To earn money
- 06 Because I enjoy it
- 07 To use my skills
- 08 To keep fit
- 09 Because I feel obliged to do it

96 None of these  
[code maximum 10 out of 10 possible responses]

END FILTER

**ERINTRO**

I will now read a couple of statements that are related to your commitment towards other people. Please tell me whether you strongly agree, agree, disagree, or strongly disagree with each statement.

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

*IF (QWP1.QWPA.Qre.WpAct = VolWork) OR (QWP1.QWPA.Qre.WpVW  
<> never) [QWP1.QWPA.Qre.WpAct = VolWork OR  
QWP1.QWPA.Qre.WpVW <> never]*

**ERVOLA FULLY SATISFIED WITH GAINS FROM VOL WORK**  
SHOW CARD I2

Considering all the efforts that I have put into my voluntary work, I am fully satisfied with what I have gained so far.

Would you say that you strongly agree, agree, disagree or strongly disagree?

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**ERVOLB ADEQUATE APPRECIATION FOR VOL WORK**  
SHOW CARD I2

Considering all the efforts that I have put into my voluntary work, I have always received adequate appreciation from others.

(Would you say that you strongly agree, agree, disagree, or strongly disagree?)

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

END FILTER

*IF (QWP1.QWPA.Qre.WpAct = VolWork) OR (QWP1.QWPA.Qre.WpVW  
<> never) [QWP1.QWPA.Qre.WpAct = VolWork OR  
QWP1.QWPA.Qre.WpVW <> never]*

**ERCARA FULLY SATISFIED WITH GAINS FROM CARING**  
SHOW CARD I2

Considering all the efforts that I have put into caring for someone, I am

fully satisfied with what I have gained so far.

(Would you say that you strongly agree, agree, disagree or strongly disagree?)

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

**ERCARB ADEQUATE APPRECIATION FROM CARING  
SHOW CARD I2**

Considering all the efforts that I have put into caring for someone, I have always received adequate appreciation from others.

(Would you say that you strongly agree, agree, disagree or strongly disagree?)

- 1 Strongly agree
- 2 Agree
- 3 Disagree
- 4 Strongly disagree

END FILTER

END FILTER

**PSYCHOSOCIAL HEALTH  
MODULE  
(PS)**

**PSCEDI**

Now think about the past week and the feelings you have experienced. Please tell me if each of the following was true for you much of the time during the past week.

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

**PSCEDA WHETHER DEPRESSED IN THE PAST WEEK**

(Much of the time during the past week), you felt depressed?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

- 1 Yes
- 2 No

**PSCEDB WHETHER EVERYTHING DONE WAS AN EFFORT**

(Much of the time during the past week), you felt that everything you did was an effort?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

- 1 Yes
- 2 No

**PSCEDC WHETHER SLEEP WAS RESTLESS**

(Much of the time during the past week), your sleep was restless?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

- 1 Yes
- 2 No

**PSCEDD WHETHER FELT HAPPY**

(Much of the time during the past week), you were happy?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

- 1 Yes
- 2 No

**PSCEDE WHETHER FELT LONELY**

(Much of the time during the past week), you felt lonely?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

- 1 Yes

2 No

**PSCEDF** WHETHER ENJOYED LIFE

(Much of the time during the past week), you enjoyed life?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

1 Yes

2 No

**PSCEDG** WHETHER FELT SAD

(Much of the time during the past week), you felt sad?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

1 Yes

2 No

**PSCEDH** WHETHER COULD NOT GET GOING

(Much of the time during the past week), you could not get going?

INTERVIEWER: Prompt if necessary - 'Would you say yes or no?'

1 Yes

2 No

**PSOLD** WHEN OLD AGE STARTS

Please could you tell us at what age you consider old age to start?

INTERVIEWER: Enter age in years.

Range: 30..100

**PSMID** WHEN MIDDLE AGE ENDS

We would also like you to tell us at what age you consider middle age to end?

INTERVIEWER: Enter age in years.

Range: 30..100

**PSTSET**

INTERVIEWER: The Psychosocial section is finished.

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

**FINAL QUESTIONS  
MODULE  
(FQ)**

**FQNR**

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

*IF ethnic group = RESPONSE [IFFW[PNum].FqEthn = RESPONSE]*

ELSE

**FQETHN ETHNIC GROUP**

SHOW CARD J1

Can I check, to which of the groups on this card do you consider that belong?

INTERVIEWER: Code one only.

- 1 White
- 2 Mixed ethnic group
- 3 Black
- 4 Black British
- 5 Asian
- 6 Asian British
- 95 Any other group

END FILTER

*IF ethnic group = Whi [FqEthn = 1]*

*IF white cultural background = RESPONSE [IFFW[PNum].FqWCult = RESPONSE]*

ELSE

**FQWCULT WHITE CULTURAL BACKGROUND**

What is cultural background? Is it...

INTERVIEWER: Read out each in turn and code all that apply.

- 1 ... English?
  - 2 ... Irish?
  - 3 ... Scottish?
  - 4 ... Welsh?
  - 5 ... Other European?
  - 95 ... Any other cultural background? (specify)
- [code maximum 6 out of 6 possible responses]

END FILTER

```

| | | | | ELSE
| | | | |
| | | | | IF ethnic group = MixEthG [FqEthn = 2]
| | | | |
| | | | | IF mixed ethnic cultural background = RESPONSE [IFFW[PNum].FqBcg
| | | | | = RESPONSE]
| | | | |
| | | | | ELSE
| | | | |
| | | | | FQBCG MIXED ETHNIC CULTURAL BACKGROUND
| | | | |
| | | | | What is cultural background? Is it...
| | | | |
| | | | | INTERVIEWER: Read out each in turn and code all that apply.
| | | | | 1 ... White British and Black Caribbean?
| | | | | 2 ... White British and Black African?
| | | | | 3 ... White British and Asian?
| | | | | 95 ... any other cultural background?(specify)
| | | | | [code maximum 4 out of 4 possible responses]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF ethnic group IN [Black, BlackBr] [FqEthn = 3, 4]
| | | | |
| | | | | IF black cultural background = RESPONSE [IFFW[PNum].FqBack =
| | | | | RESPONSE]
| | | | |
| | | | | ELSE
| | | | |
| | | | | FQBACK BLACK CULTURAL BACKGROUND
| | | | |
| | | | | What is cultural background? Is it...
| | | | |
| | | | | INTERVIEWER: Read out each in turn and code all that apply.
| | | | | 1 ... Caribbean?
| | | | | 2 ... African?
| | | | | 95 ... any other cultural background? (specify)
| | | | | [code maximum 3 out of 3 possible responses]
| | | | |
| | | | | END FILTER
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF ethnic group IN [Asian, AsianBr] [FqEthn = 5, 6]
| | | | |
| | | | | IF asian cultural background = RESPONSE [IFFW[PNum].FqCbac
| | | | | = RESPONSE]

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| | | IF (((FqWCult = OtherCB) OR (FqBcg = OtherCB)) OR (FqBack = OtherCB))
| | | OR (FqCbac = OtherCB)) OR (FqCulb = OtherCB) [FqWCult = 95 OR FqBcg = 95
| | | OR FqBack = 95 OR FqCbac = 95 OR FqCulb = 95]
| | |
| | | IF other cultural background = RESPONSE [IFFW[PNum].FqCulb =
| | | RESPONSE]
| | |
| | | ELSE
| | |
| | | FQCULTO OTHER CULTURAL BACKGROUND
| | |
| | | How would you describe cultural background?
| | | String: 60
| | |
| | | END FILTER
| | |
| | | IF (FqCultO = RESPONSE) AND (EditQre = Yes) [FqCultO = RESPONSE
| | | AND EditQre = 1]
| | |
| | | FQCUL CULTURAL BACKGROUND
| | | EDITOR: CODEFRAME 55
| | | What is cultural background? : [^other cultural background]
| | | Is it ... READ OUT EACH IN TURN AND CODE ALL THAT APPLY ...
| | |
| | | 01 British
| | | 02 Irish
| | | 03 English
| | | 04 Scottish
| | | 05 Welsh
| | | 06 Cornish
| | | 07 Cypriot (part not stated)
| | | 08 Greek
| | | 09 Greek Cypriot
| | | 10 Turkish
| | | 11 Turkish Cypriot
| | | 12 Italian
| | | 13 Irish Traveller
| | | 14 Traveller/Gypsy/Romany
| | | 15 Polish
| | | 16 All republics which made up the former USSR
| | | 17 Kosovan
| | | 18 Albanian
| | | 19 Bosnian
| | | 20 Croatian
| | | 21 Serbian
| | | 22 Other republics which made up the former Yugoslavia
| | | 23 Other white European
| | | 24 South American
| | | 25 Mixed white
| | | 26 Other white, white unspecified
| | | 27 White and Black Caribbean

```

28	White and Black African
29	White and Asian
30	Black and Asian
31	Black and Chinese
32	Black and White
33	Chinese and White
34	Asian and Chinese
35	Other mixed, mixed unspecified
36	Indian or British Indian
37	Pakistani or British Pakistani
38	Bangladeshi or British Bangladeshi
39	Mixed Asian
40	Punjabi
41	Kashmiri
42	East African Asian
43	Sri Lankan
44	Tamil
45	Sinhalese
46	British Asian
47	Other Asian, Asian unspecified
48	Caribbean
49	African
50	Somali
51	Mixed Black
52	Nigerian
53	Black British
54	Other black, black unspecified
55	Chinese
56	Africa - colour not defined
57	Middle East
58	Vietnamese
59	Japanese
60	Filipino
61	Any other group
62	Buddhist
63	Hindu
64	Jewish
65	Muslim
66	Sikh
67	Arab
68	Kurdish
85	Other answer - not codeable 01 to 68
86	Irrelevant response - not codeable 01 to 68
	[code maximum 8 out of 70 possible responses]
	END FILTER
	END FILTER
	<i>IF country of birth &lt;&gt; RESPONSE [IFFW[PNum].FqCbth &lt;&gt; RESPONSE]</i>

**FQCBTH COUNTRY OF BIRTH**

In which country born?

- 1 England
- 2 Scotland
- 3 Wales
- 4 Northern Ireland
- 5 Republic of Ireland
- 6 Elsewhere outside of UK

END FILTER

*IF ((FqCbth = RESPONSE) AND (FqCbth <> Engl)) AND year of arrival to  
England <> RESPONSE) [FqCbth = RESPONSE AND FqCbth <> 1 AND IFFW  
[PNum].FqCEng <> RESPONSE]*

**FQCENG YEAR OF ARRIVAL TO ENGLAND**

In what year did come to live in England?

INTERVIEWER: Write in year.  
Range: 1900..2050

END FILTER

*IF IFFW[PNum].FqQualD = RESPONSE [IFFW[PNum].FqQualD =  
RESPONSE]*

**FQMQUA WHETHER OBTAINED QUALIFICATIONS SINCE LAST INTERVIEW**

Since the last time that we interviewed , obtained any qualifications?

- 1 Yes
- 2 No

ELSE

**FQAQUA WHETHER HAS ANY QUALIFICATIONS ON CARD**

SHOW CARD J2

Do you have any of the qualifications listed on this card? Please look down the  
whole list before telling me.

- 1 Yes
- 2 No

END FILTER

*IF (FqMqua = Yes) OR (FqAQua = Yes) [FqMqua = 1 OR FqAQua = 1]*

**FQQUAL QUALIFICATION TYPE**

SHOW CARD J2

Which of the qualifications on this card ? Just tell me the number written beside each one.

INTERVIEWER:Record all that apply.

PROBE - 'Any others?'

- 01 @MDegree/degree level qualification (including higher degree)
  - 02 @MTeaching qualification
  - 03 @MNursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
  - 04 @MHNC/HND, BEC/TEC Higher, BTEC Higher/SCOTTECH Higher
  - 05 @MONC/OND/BEC/TEC/BTEC not higher
  - 06 @MCity and Guilds Full Technological Certificate
  - 07 @MCity and Guilds Advanced/Final Level
  - 08 @MCity and Guilds Craft/Ordinary Level
  - 09 @MA-levels/Higher School Certificate
  - 10 @MAS level
  - 11 @MSLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies
  - 12 @MO-level passes taken in 1975 or earlier
  - 13 @MO-level passes taken after 1975 GRADES A-C
  - 14 @MO-level passes taken after 1975 GRADES D-E
  - 15 @MGCSE GRADES A-C
  - 16 @MGCSE GRADES D-G
  - 17 @MCSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3
  - 18 @MCSE GRADES 2-5/SCE Ordinary BANDS D-E
  - 19 @MCSE Ungraded
  - 20 @MSLC Lower
  - 21 @MSUPE Lower or Ordinary
  - 22 @MSchool Certificate or Matric
  - 23 @MNVQ Level 5
  - 24 @MNVQ Level 4
  - 25 @MNVQ Level 3/Advanced level GNVQ
  - 26 @MNVQ Level 2/Intermediate level GNVQ
  - 27 @MNVQ Level 1/Foundation level GNVQ
  - 28 @MRecognised Trade Apprenticeship completed
  - 29 @MClerical or Commercial Qualification (eg typing/book-keeping/commerce)
  - 95 @MOther qualifications
- [code maximum 3 out of 30 possible responses]

*IF (EditQre = Yes) AND (FqQual = Other) [EditQre = 1 AND FqQual = 95]*

**FQQUAZ QUALIFICATION TYPE**

EDITOR : Back code here - CODE FRAME 56

Which of the qualifications on this card ? Just tell me the number written beside each one.

- 01 Degree/degree level qualification (including higher degree)
- 02 Teaching qualification

- 03 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
- 04 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTTECH Higher
- 05 ONC/OND/BEC/TEC/BTEC not higher
- 06 City and Guilds Full Technological Certificate
- 07 City and Guilds Advanced/Final Level
- 08 City and Guilds Craft/Ordinary Level
- 09 A-levels/Higher School Certificate
- 10 AS level
- 11 SLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies
- 12 O-level passes taken in 1975 or earlier
- 13 O-level passes taken after 1975 GRADES A-C
- 14 O-level passes taken after 1975 GRADES D-E
- 15 GCSE GRADES A-C
- 16 GCSE GRADES D-G
- 17 CSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3
- 18 CSE GRADES 2-5/SCE Ordinary BANDS D-E
- 19 CSE Ungraded
- 20 SLC Lower
- 21 SUPE Lower or Ordinary
- 22 School Certificate or Matric
- 23 NVQ Level 5
- 24 NVQ Level 4
- 25 NVQ Level 3/Advanced level GNVQ
- 26 NVQ Level 2/Intermediate level GNVQ
- 27 NVQ Level 1/Foundation level GNVQ
- 28 Recognised Trade Apprenticeship completed
- 29 Clerical or Commercial Qualification (eg typing/book-keeping/commerce)
- 51 Other - Qualifications outside the UK
- 52 Other - Other vocational qualifications not otherwise codeable
- 53 Other - NVQ level not specified
- 54 Other - Nursery nurse examination board qualification
- 55 Other - Qualification obtained during military service
- 56 Other - Diploma
- 57 Other - Other academic qualification not otherwise codeable
- 58 Other - Other professional qualification not otherwise codeable
- 85 Other answer - not codeable 01 to 29, 51 to 58, or 96
- 86 Irrelevant response - not codeable 01 to 29, 51 to 58, or 96
- 95 Other
- 96 None of these

[code maximum 5 out of 41 possible responses]

END FILTER

*IF (FqQual = Other) AND ((EditQre <> Yes) OR (FqQuaZ = EMPTY OR  
 (FqQuaZ = Other))) [FqQual = 95 AND EditQre <> 1 OR FqQuaZ = EMPTY  
 OR FqQuaZ = 95]*

**FQQQ QUALIFICATION NAME**

What qualifications are these?

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| | | | INTERVIEWER:Record all other qualifications in full.
| | | | PROBE - 'What else?'
| | | | String: 60
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF age finished education <> RESPONSE [IFFW[PNum].FqEnd <>
| | | | RESPONSE]
| | | |
| | | | FQEND AGE FINISHED EDUCATION
| | | |
| | | | At what age did finish continuous full-time education at school or college?
| | | | 1 Not yet finished
| | | | 2 Never went to school
| | | | 3 14 or under
| | | | 4 At 15
| | | | 5 At 16
| | | | 6 At 17
| | | | 7 At 18
| | | | 8 19 or over
| | | |
| | | | END FILTER
| | | |
| | | | IF Willingness to give proxy nomination = Will [IFFW[PNum].FqProx =
| | | | Will]
| | | |
| | | | FQPROXB CONFIRM STABLE ADDRESS
| | | | Last time we interviewed , gave us the details of a relative or close friend we
| | | | could approach to collect information about your circumstances if we were
| | | | unable to contact you personally when we next visited. This could be if you
| | | | were ill at the time, or had moved into a residential or nursing home and were
| | | | unable to speak to us.
| | | | Can I check that the contact details for this person are correct?
| | | |
| | | | INTERVIEWER: Check name, address and telephone number of proxy
| | | | nomination, as given on
| | | | the ARF cover sheet, are still correct. If details are different or were incomplete
| | | | on coversheet,
| | | | write correct details on ARF at Section G (Proxy nomination).
| | | | 1 Contact address details correct
| | | | 2 Contact address details not correct
| | | | 3 SPONTANEOUS: Does not wish to be interviewed by proxy
| | | |
| | | | ELSE
| | | |
| | | | FQPROX WILLINGNESS TO GIVE PROXY NOMINATION
| | | | Sometime in the next two years, we will wish to contact you again. If we are

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| | | | unable to contact you personally when we next visit, for example if you were  
| | | | ill at the time, would you be prepared for us to collect information about your  
| | | | circumstances from a relative or a close friend?

| | | | INTERVIEWER: If asked please clarify further: 'For example, we would not  
intentionally  
| | | | approach someone if you were away on holiday or temporarily ill. We would only  
approach the  
| | | | person if you were too sick, either physically or mentally, or if you had died. We  
would not  
| | | | give the person details of what you have said in previous interviews.'

| | | | INTERVIEWER: If  
| | | | given, write details on ARF at Section G (Proxy Nomination).  
| | | | 1 Willing to give proxy nomination  
| | | | 2 Unwilling to give proxy nomination  
| | | | 3 SPONTANEOUS: Does not wish to be interviewed by proxy

| | | | END FILTER

| | | | *IF (FqProx = Will) OR (FqProxB = NCorr) [FqProx = 1 OR FqProxB = 2]*

| | | | **FQPRW1** WHO PROXY NOMINATION IS

| | | | Who would be the best person for us to approach?

- | | | | 01
- | | | | 02
- | | | | 03
- | | | | 04
- | | | | 05
- | | | | 06
- | | | | 07
- | | | | 08
- | | | | 09
- | | | | 10
- | | | | 11
- | | | | 12
- | | | | 13
- | | | | 14
- | | | | 15
- | | | | 16
- | | | | 97 Not a household member

| | | | *IF who proxy nomination is = NotHh [FqPrW1 = 97]*

| | | | **FQPRW2**

| | | | INTERVIEWER: Write name, address & telephone number of nominated proxy  
on ARF at

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| | | | section G.
| | | |
| | | | INTERVIEWER: Enter 1 to continue.
| | | | Range: 1..1
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF give stable address <> Willing [IFFW[PNum].FqAddr <> Willing]
| | | |
| | | | FQADDR GIVE STABLE ADDRESS
| | | |
| | | | In case move from this address, could you tell me the address and telephone
| | | | number of a relative or close friend we could contact to find out where ?
| | | |
| | | | INTERVIEWER: If the respondent is unwilling to give address as they are not
| | | | planning to move,
| | | | add: 'As people who aren't planning to move sometimes do move because their
| | | | circumstances
| | | | change, we would be very grateful if you could give us the name and address of
| | | | a contact person
| | | | just in case you do move unexpectedly.'
| | | |
| | | | INTERVIEWER:If given, write the details on ARF
| | | | at Section G (Stable Address).
| | | | 1 Willing to give contact address
| | | | 2 Unwilling to give contact address
| | | | 3 SPONTANEOUS: Does not wish to be recontacted
| | | |
| | | | ELSE
| | | |
| | | | IF give stable address = Willing [IFFW[PNum].FqAddr = Willing]
| | | |
| | | | FQSTC CONFIRM STABLE ADDRESS
| | | | Last time we interviewed , gave us the address and telephone number of a
| | | | relative or close friend we could contact to find out where you are if move
| | | | from this address. Can I check that these details are still correct?
| | | |
| | | | INTERVIEWER:Check name, address and telephone number of stable contact,
| | | | as given on
| | | | the ARF cover sheet, are still correct.
| | | | If different, write correct details on ARF at Section G
| | | | (Stable Address).
| | | |
| | | | Please do not enter details of people living in the same household as
| | | | the respondent. Ask for details of someone living elsewhere instead.
| | | | 1 Contact address details correct

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- 2 Contact address details not correct
- 3 SPONTANEOUS: Does not wish to be recontacted

END FILTER

END FILTER

*IF Qld.QID1.Qre[PNum].Dilnt = 97 [Qld.QID1.Qre[PNum].Dilnt = 97]*

**FQADDP PROXY INFORMANT DETAILS**

For our records, we would like to record who answered the interview on 's behalf. Could you please give me your full name, address and telephone number?

INTERVIEWER: If given write on ARF at Section G (Proxy Informant).

- 1 Willing to give address
- 2 Unwilling to give address

END FILTER

*IF (((IFFW.Conreca <> Given) AND (IFFW.Conrecb <> Given)) AND  
/ / / (IFFW.ConFlagA <> Yes)) AND (IFFW.ConFlagB <> Yes) [IFFW[PNum].Conreca  
/ / / <> Given AND IFFW[PNum].Conrecb <> Given AND IFFW[PNum].ConFlagA  
/ / / <> Yes AND IFFW[PNum].ConFlagB <> Yes]*

**FQCONS HEALTH AND ECONOMIC CONSENT**

We have asked about your health and economic circumstances. To make this information complete we would like to collect information from administrative records held by the National Health Service, Her Majesty's Revenue and Customs and the Department for Work and Pensions. Like the answers you have given us, the information collected from these records will be completely confidential in accordance with the Data Protection Act. Consenting to this will not affect any benefit entitlement. This form explains in more detail and you can ask me any questions that you may have.

INTERVIEWER: Give respondent the yellow consent form.  
If respondent signs form,  
remember to leave them the white tear-off copy.  
Press <F9> for help on where to find NI  
number.

- 1 Consents A and B given
- 2 Consent A only given
- 3 Consent B only given
- 4 Both consents refused
- 5 Consent form left with respondent

ELSE

| | | | IF (IFFW.Conreca <> Given) AND (IFFW.Conrecb = Given) [IFFW  
| | | | [PNum].Conreca <> Given AND IFFW[PNum].Conrecb = Given]  
| | | | IF IFFW[PNum].ConFlagA <> Yes [IFFW[PNum].ConFlagA <> Yes]  
| | | |

| | | | **FQCONA** ADDITIONAL HEALTH CONSENT

| | | | Our records show that you have kindly given us written permission to  
| | | | obtain information from administrative records held by Her Majesty's  
| | | | Revenue and Customs and the Department for Work and Pensions.  
| | | | In order to make our information about your health complete, we would  
| | | | like to find out more from administrative records held by the National  
| | | | Health Service. The information from these records will be completely  
| | | | confidential in accordance with the Data Protection Act.

| | | | INTERVIEWER: Probe to find out if the respondent is likely to give additional  
| | | | consent.

| | | | - IF ADDITIONAL CONSENT GIVEN:--Use new yellow consent form.  
| | | | Respondents to

- | | | | circle A and B and then sign at the bottom.  
| | | | - IF ADDITIONAL CONSENT REFUSED:--  
| | | | You do not need to do anything, just code below.  
| | | | - IF WITHDRAWING CONSENT:--  
| | | | You do not need to do anything, just code below.  
| | | | 1 Additional health consent given  
| | | | 2 Additional health consent refused  
| | | | 3 Yellow Consent form left with respondent  
| | | | 4 Respondent withdrew health and economic consent  
| | | | 5 SPONTANEOUS: Respondent would like copy of consent form

| | | | ELSE

| | | | IF IFFW[PNum].ConFlagA = Yes [IFFW[PNum].ConFlagA = Yes]

| | | | **FQCONAR** ECONOMICS CONSENT REMINDER

| | | | Our records show that you have kindly given us written permission to  
| | | | obtain information from administrative records held by Her Majesty's  
| | | | Revenue and Customs and the Department for Work and Pensions.

| | | | You may still have a copy of the form you signed.

| | | | - IF STILL GIVES CONSENT:--You do not need to do anything, just  
| | | | code below.

| | | | - IF WITHDRAWING CONSENT:--You do not need to do anything,  
| | | | just code below.

- | | | | 1 Consent to economics linkage still given  
| | | | 2 Respondent asked to withdraw economics consent  
| | | | 3 SPONTANEOUS: Respondent would like copy of consent form



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| | | | | You may still have a copy of the form you signed.
| | | | | - IF STILL GIVES CONSENT:--You do not need to do anything, just
| | | | | code below.
| | | | | - IF WITHDRAWING CONSENT:--You do not need to do anything,
| | | | | just code below.
| | | | | 1 Consent to health linkage still given
| | | | | 2 Respondent asked to withdraw health consent
| | | | | 3 SPONTANEOUS: Respondent would like copy of consent form
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF (IFFW.Conreca = Given) AND (IFFW.Conrecb = Given) [IFFW
| | | | | / | | | | | [PNum].Conreca = Given AND IFFW[PNum].Conrecb = Given]
| | | | |
| | | | | FQCONC HEALTH AND ECONOMIC CONSENT
| | | | | Our records show that you have kindly given us written permission to
| | | | | obtain information from administrative records held by the National
| | | | | Health Service and administrative records held by Her Majesty's
| | | | | Revenue and Customs and the Department for Work and Pensions.
| | | | | You may still have a copy of the form you signed.
| | | | |
| | | | | - IF STILL CONSENTING TO HEALTH AND ECONOMIC LINKAGE:
| | | | | --You do not need to do anything, just code below.
| | | | | -IF WITHDRAWING ONE OR BOTH CONSENTS:--You do not need to
| | | | | do anything, just code below.
| | | | | 1 Consent to health and economic consent still given
| | | | | 2 Respondent consents to health only
| | | | | 3 Respondent consents to economics only
| | | | | 4 Respondent asked to withdraw health and economic consent
| | | | | 5 SPONTANEOUS: Respondent would like copy of consent form
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | END FILTER
| | | | |
| | | | | IF (IFFW.NHSCR <> Permiss) AND (IFFW.NHSCFlag <> Yes) [IFFW
| | | | | / | | | | | [PNum].NHSCR <> Permiss AND IFFW[PNum].NHSCFlag <> Yes]
| | | | |
| | | | | FQNHSC GIVEN HES CONSENT
| | | | |
| | | | | The National Health Service has a central register which records information
| | | | | on important diseases and causes of death. May we have your permission to
| | | | | pass your name, address, and date of birth to this register?

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| | | | 1 Permission given
| | | | 2 Refused
| | | | IF given HES consent = Permiss [FQNHSC = 1]
| | | | FQNHSCS SIGNED HES CONSENT FORM
| | | | INTERVIEWER: EXPLAIN THE NEED FOR WRITTEN CONSENT: 'Before I
can pass your
| | | | details on, I have to obtain written consent from you'.
| | | | INTERVIEWER:Enter details on
| | | | the pink NHS Central Register Consent Form.
| | | | Ask respondent to sign and date form.
| | | | Code whether signed consent obtained.
| | | | 1 Signed consent obtained
| | | | 2 Signed consent not obtained
| | | | END FILTER
| | | | END FILTER
| | | | LOOP FOR idx:= 1 TO 12
| | | | IF DMExit = AllocP[PNum] [DMExit = AllocP]
| | | | IF QInd.QFq.QESetup.PElig = Yes [PElig = 1]
| | | | FQEIINT PROXY TO ANSWER END OF LIFE INTERVIEW
| | | | I was told earlier that has passed away. In order to ensure that we
| | | | understand the end of life, we have some questions we would like to ask
| | | | about . Would you be willing to answer these questions at a future date?
| | | | INTERVIEWER: Give details of content of end of life interview. It will cover
the deceased
| | | | respondent's activities in the last year of life, health and some summary
financial
| | | | information.
| | | | Offer a telephone unit appointment if respondent would prefer. Say 'If
| | | | you would prefer I can organise for another interviewer to ask you the
questions over the
| | | | telephone.
| | | | Priority code.
| | | | 1 Willing to answer end of life interview face-to-face
| | | | 2 Willing to answer end of life interview by telephone

```

- 3 Unwilling to answer end of life interview
- 4 SPONTANEOUS ONLY: Unwilling for anyone to answer the end of life interview

END FILTER

*IF proxy to answer end of life interview = UnWilling [FqEiInt = 3]*

**FQEIAN Y** GIVE DETAILS OF END OF LIFE INFORMANT

Could you nominate someone else who could answer the questions?

If appropriate, refer to stable address contact.

- 1 Willing to give details of end of life interview informant
- 2 Unwilling to give details of end of life interview informant

*IF give details of end of life informant = Willing [FqEiAny = 1]*

**FQEIHM MEM** PERSON NUMBER POTENTIAL END OF LIFE INTERVIEW

RESP

INTERVIEWER: Enter person number of potential end of life interview respondent.

97 : Not a household member  
Range: 1..97

*IF person number potential end of life interview resp = RESPONSE  
[FqEiHMem = RESPONSE]*

**FQEIREL** RELATIONSHIP TO DECEASED

How is the potential end of life interview respondent related to ?

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step son/daughter/child of partner
- 07 Son/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Stepparent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild

- 20 Grandparent
- 21 Other relative
- 22 Other non-relative
- 96 (THIS CODE NOT USED)

END FILTER

END FILTER

*IF (FqEiInt IN [WillFtF, WillTU]) OR (FqEiAny = Willing) [FqEiInt = 1, 2  
OR FqEiAny = 1]*

**FQEIARF**

INTERVIEWER: Please get an ERF (End of Life Interview Address Record Form) and enter

these details as directed.

Please also enter these details at Section D on the ARF.

Press 1 and <Enter> to continue.

Range: 1..1

*IF give details of end of life informant = Willing [FqEiAny = 1]*

**FQEIWH**

INTERVIEWER: Will it be possible for you to follow this up?

If it is within a reasonable distance, please attempt to.

- 1 Yes
- 2 No

END FILTER

*IF proxy to answer end of life interview = WillFtF [FqEiInt = 1]*

**FQEIAPT**

INTERVIEWER: You are required to follow this up. It may take a few days for you to

receive the slot for this end of life interview so please tell the respondent you will

contact them to arrange the interview soon.

Press 1 and <Enter> to continue.

Range: 1..1

ELSE

*IF proxy to answer end of life interview = WillTU [FqEiInt = 2]*

**FQEITU TELEPHONE DETAILS OF END OF LIFE RESPONDENT**

INTERVIEWER: Collect telephone details.  
String: 15

**FQEIBT TIME CONVENIENT FOR TELEPHONE CALL**

INTERVIEWER: Establish when would be the best time for the telephone unit to call.

- 1 9 am - 12 pm
- 2 12 pm - 3 pm
- 3 3 pm - 6 pm
- 4 6 pm - 9 pm
- 5 Any time in morning (before midday)
- 6 Any time in afternoon (after midday)
- 7 Any time at all

**FQEIBD DAY CONVENIENT FOR TELEPHONE CALL**

INTERVIEWER: Which is the best day for the telephone unit to call?

CODE  
ALL THAT APPLY.

- 1 Monday
- 2 Tuesday
- 3 Wednesday
- 4 Thursday
- 5 Friday
- 6 Saturday
- 7 Sunday
- 8 Any weekday
- 9 At the weekend

[code maximum 4 out of 9 possible responses]

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

| | | IF @/INTERVIEWER: Please enter th = person who answered the Household  
| | | Grid. [AllocP = QHD.DhResp]

| | | LOOP FOR idx:= 1 TO 12

| | | IF DMInst IN [Personal .. ProxyOth] [DMInst = 1 , 2, 3]

| | | IF QInd.QFq.QMISetup.PType = 3 [PType = 3]

| | | **FQMIPRX** GIVE INSTITUTION PROXY DETAILS  
| | | You told me earlier that has moved into a residential/nursing home  
| | | and would not be capable of answering questions . Please can you give  
| | | me the details of the person you would like us to talk to about .

| | | INTERVIEWER: If given, please write on ARF section C6.

- | | | 1 Willing to give institution proxy informant details
- | | | 2 Unwilling to give institution proxy informant details

| | | ELSE

| | | **FQMIADD** GIVE INSTITUTION DETAILS  
| | | You told me earlier that has moved into a residential/nursing home.  
| | | Would you be prepared to give me the contact details of 's  
| | | residential/nursing home?

| | | INTERVIEWER: If given, write details on ARF section C8.

- | | | 1 Willing to give institution details
- | | | 2 Unwilling to give institution details

| | | END FILTER

| | | **TITL** RESPONDENT DETAILS

| | | INTERVIEWER:Check/collect respondent's title, first name and surname.  
| | | If new/different, write  
| | | the details on ARF at Section G.

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

| | | **ADDR** RESPONDENT ADDRESS

| | | INTERVIEWER: Check address as written on the ARF is correct. If not correct,

then write changes

on Address label.

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

#### **TEL RESPONDENT TELEPHONE NUMBER**

INTERVIEWER: Check/collect respondents telephone number.

If new/different, write the details

on ARF.

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

#### **EMAIL RESPONDENT EMAIL**

INTERVIEWER: If respondent's email address is on the coversheet, check it is correct.

If not on

coversheet, collect email address (if they have one).

If new/different, write the details on the ARF at Section G.

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

#### **FQHELP HELP WITH SHOWCARDS**

INTERVIEWER: Did respondent need any help reading the showcards during the interview?

- 1 Yes - due to sight problems
- 2 Yes - due to literacy problems
- 3 Yes - don't know reason
- 4 No

#### **FQRETRO WILLING TO DO RETRO INTERVIEW**

There are two parts to this survey. You have just helped us with the first part. We hope you will also help us with the second part, which is a brand new interview about your past life. It will ask about key events in your life for example schooling, marriage, children and places where you have lived.

Would you be willing to do this interview?

- 1 Yes
- 2 No

*IF Willing to do retro interview = Yes [FqRetro = 1]*

#### **FQ2RETR IF RETROSPECTIVE INTERVIEW ARRANGED**

INTERVIEWER:

```

| | | | If you do not have retrospective programme yet: Tell respondent that you
| | | | will contact them in the near future to arrange the interview.
| | | |
| | | | If you have retrospective
| | | | programme: Arrange time to do the interview.
| | | | 1 Interview to be arranged in future
| | | | 2 Appointment for interview arranged
| | | |
| | | | ELSE
| | | |
| | | | IF Willing to do retro interview = No [FqRetro = 2]
| | | |
| | | | FQRRETR REASON FOR REFUSING RETROSPECTIVE INTERVIEW
| | | |
| | | | INTERVIEWER: Record reason why respondent refused retrospective
| | | | interview.
| | | |
| | | | CODE
| | | | ALL THAT APPLY.
| | | | 1 Given enough time already to this survey/ expecting too much
| | | | 2 Too busy, cannot spare the time (if Code 1 does not apply)
| | | | 3 Does not want to talk about past/ too personal
| | | | 4 Not interested/Can't be bothered/ No particular reason
| | | | 95 Other reason (specify)
| | | | [code maximum 5 out of 5 possible responses]
| | | |
| | | |
| | | | FQRETRX OTHER REASON FOR REFUSING RETROSPECTIVE
| | | | INTERVIEW
| | | |
| | | | INTERVIEWER: Please specify other reason for refusal.
| | | | String: 60
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | END FILTER
| | | |
| | | | IF Pilot <> Yes [Pilot <> 1]
| | | |
| | | | SC4END
| | | | This is almost the end of the interview. Thank you very much for taking part.
| | | | I'm now going to ask to come back into the room so I can ask him/her some
| | | | questions on his/her own. I would like you to leave the room and complete a
| | | | short paper questionnaire.
| | | |
| | | |

```

INTERVIEWER: Give BLUE self-completion to and ask to leave the room.  
Ask to come back  
into the room.

Code whether or not self-completion was obtained from .

- 1 Completed by respondent, to be posted by interviewer
- 2 To be posted back by respondent
- 3 Respondent did not complete self-completion

END FILTER

**SC5END**

That is the end of the interview. Thank you very much for taking part.

INTERVIEWER: Ask to come back into the room.

Code whether or not self-completion was  
obtained from .

- 1 Completed by respondent, to be posted by interviewer
- 2 To be posted back by respondent
- 3 Respondent did not complete self-completion

*IF MMStarted[IndNo] = No [MMStarted[IndNo] = No]*

**REMINDC**

INTERVIEWER: Do you wish to do the Walking Test now?

- To enter the measurements  
questionnaire, press <Ctrl Enter>.

- Else, press <Enter> to continue.

Range: 1..1

END FILTER

ELSE

*IF MMStarted[IndNo] = No [MMStarted[IndNo] = No]*

**REMINDD**

INTERVIEWER: Do you wish to do the Walking Test now?

- To enter the measurements  
questionnaire, press <Ctrl Enter>.

- Else, press <Enter> to continue.

Range: 1..1

END FILTER

**SC6END**

That is the end of the interview. Thank you for taking part.

Before I go, I would like to give you this short paper questionnaire for you to fill in in your own time.

INTERVIEWER: Give BLUE self-completion to respondent.

- 1 Completed by respondent, to be posted by interviewer
- 2 To be posted back by respondent
- 3 Respondent did not complete self-completion

*IF IFFW[PNum].SCFlag = Work [IFFW[PNum].SCFlag = Work]*

**FQEXSC1**

INTERVIEWER: Please ask respondent to complete the yellow questionnaire.

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

ELSE

*IF IFFW[PNum].SCFlag = Health [IFFW[PNum].SCFlag = Health]*

**FQEXSC2**

INTERVIEWER: Please ask respondent to complete the green questionnaire.

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

END FILTER

END FILTER

*IF (IlaNow = No) OR (IHoNow = No) [IlaNow = 2 OR IHoNow = 2]*

**IAHOCK**

INTERVIEWER: Remember that you still need to complete the .

Go back and do this

now or arrange a time to come back to

- 1 Go back to Income and Assets Section
- 2 Go back to Housing Section
- 3 Arrange a time to come back

END FILTER

| | | | IF EditQre <> Yes [EditQre <> 1]

| | | | **AFQTHK**

| | | | INTERVIEWER: Press 1 and enter to allow the program to calculate the  
interview length.

| | | | Range: 1..1

| | | | END FILTER

| | | | IF EditQre <> Yes [EditQre <> 1]

| | | | IF (((((((QHo.QOwner.QPrevMort[1].HoMExt = Yes) OR  
| | | | (QHo.QOwner.QPrevMort.HoMExt = Yes)) OR (QHo.QOwner.HoMNew =  
| | | | Yes)) OR (((QIA.Qiab.laBeR = InSupp) OR (QIA.Qiab.laBeR = PensTC))  
| | | | AND (IAgeOf >= 60))) OR (((QIA.Qiab.laBeR = InSupp) OR  
| | | | (QIA.Qiab.laBeR = PensTC)) AND (IAgeOf >= 60))) OR (((QIA.Qiab.laBeP  
| | | | = InSupp) OR (QIA.Qiab.laBeP = PensTC)) AND (IAgePart >= 60))) OR  
| | | | (((QIA.Qiab.laBeP = InSupp) OR (QIA.Qiab.laBeP = PensTC)) AND  
| | | | (IAgePart >= 60)) [QHo.QOwner.QPrevMort.HoMExt = 1 OR  
| | | | QHo.QOwner.QPrevMort.HoMExt = 1 OR QHo.QOwner.HoMNew = 1 OR  
| | | | QIA.Qiab.laBeR = 1 OR QIA.Qiab.laBeR = 2 AND IAgeOf >= 60 OR  
| | | | QIA.Qiab.laBeR = 1 OR QIA.Qiab.laBeR = 2 AND IAgeOf >= 60 OR  
| | | | QIA.Qiab.laBeP = 1 OR QIA.Qiab.laBeP = 2 AND IAgePart >= 60 OR  
| | | | QIA.Qiab.laBeP = 1 OR QIA.Qiab.laBeP = 2 AND IAgePart >= 60]

| | | | **FQDEV**

| | | | We are developing a couple of the questions we asked you in this  
interview. I would be grateful if you could tell me how you found them.

| | | | INTERVIEWER: Press 1 and enter. If respondent refuses, press CTR+R.  
1 Press <1> and <Enter> to continue.

| | | | END FILTER

| | | | END FILTER

| | | | **INCENT**

| | | | INTERVIEWER: Did you leave a cheque with the respondent?

| | | | 1 Yes

2 No

*IF @/INTERVIEWER: Did you leave a = No [Incent = 2]*

**VOUCH**

INTERVIEWER: Code if any further action needed on incentives.

- 1 Need to replace cheque with voucher
- 2 Need to send voucher to new partner
- 3 Other action needed (specify)
- 4 No action needed

*IF @/INTERVIEWER: Code if any fur = Other [Vouch = 3]*

**VOUCHOTH**

INTERVIEWER: Specify other action needed

Press <Alt S> when finished.

Open

END FILTER

END FILTER

**TIMED WALK  
MODULE  
(MM)**

*IF QInd.VAllocP = RESPONSE [QInd.VAllocP = RESPONSE]*

**MFIRST**

INTERVIEWER: This is the Measurements Questionnaire for...

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

**MINTDAT**

INTERVIEWER: Today's date is displayed below.

Please amend it if it's not correct.

*IF IAgeOF >= 60 [IAgeOF >= 60]*

**MMSCHS**

INTERVIEWER: Record respondent status.

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

*IF MmSchs <> walkunaid [MmSchs <> walkunaid]*

**MMALONE**

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

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

END FILTER

*IF (MmSchs = walkunaid) OR (MmAlone = Yes) [MmSchs = walkunaid  
OR MmAlone = Yes]*

**MMHSS**

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

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

- 1 No apparent restriction
- 2 Yes, Recent surgery
- 3 Yes, Injury

```

| | | | | 4 Yes, Other health condition
| | | | | IF MmHSS = NoRestr [MmHSS = NoRestr]
| | | | | MMWILL
| | | | | Are you willing to do the walking test?
| | | | | 1 Yes
| | | | | 2 No
| | | | | IF MmWill = Yes [MmWill = Yes]
| | | | | MMSAF
| | | | | INTERVIEWER: Do you feel that it is safe to continue with the walking
test?
| | | | | 1 Yes
| | | | | 2 No
| | | | | END FILTER
| | | | | END FILTER
| | | | | END FILTER
| | | | | IF (((((((MmHSS IN [RecSurg, Injury, Other]) OR (MmHSS =
| | | | | DONTKNOW)) OR (MmHSS = REFUSAL)) OR (MmAlone IN [No,
| | | | | YesCant])) OR (MmAlone = DONTKNOW)) OR (MmAlone = REFUSAL))
| | | | | OR (MmSaf = No)) OR (MmSaf = DONTKNOW)) OR (MmSaf = REFUSAL)
| | | | | [MmHSS = RecSurg, Injury, Other OR MmHSS = DONTKNOW OR
| | | | | MmHSS = REFUSAL OR MmAlone = No, YesCant OR MmAlone =
| | | | | DONTKNOW OR MmAlone = REFUSAL OR MmSaf = No OR MmSaf =
| | | | | DONTKNOW OR MmSaf = REFUSAL]
| | | | | MMSTOP
| | | | | INTERVIEWER: Stop test, for example saying: 'It would be safest to skip this
test and move
| | | | | on to the next set of questions.
| | | | | 1 Press <1> and <Enter> to continue.
| | | | | END FILTER
| | | | | END FILTER
| | | | | IF IAgeOF >= 60 [IAgeOF >= 60]
| | | | | IF (QMM1.Qre.MmWill = Yes) AND (QMM1.Qre.MmSaf = Yes)
| | | | | [QMM1.Qre.MmWill = Yes AND QMM1.Qre.MmSaf = Yes]
| | | | | MMAVSP

```

INTERVIEWER: Check availability of suitable space.

- 1 Suitable space available
- 2 No suitable space

*IF MmAvsp = SafeSpace [MmAvsp = SafeSpace]*

**MMWALA**

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

INTERVIEWER: Demonstrate the walk for the respondent.

(I will walk with you.)

Do you feel this would be safe?

- 1 Yes
- 2 No

*IF MmWala = Yes [MmWala = Yes]*

**MMSTRT**

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

INTERVIEWER: Ask the respondent to stand with both feet together at the start of

the walking course.

When the respondent is properly positioned at the start of the walking course, say: 'Ready, begin!'

Press the start/stop button to start the stopwatch as the respondent's foot hits the floor across the starting line.

If

possible walk behind and to the side of the respondent.

Stop timing when the respondent's foot hits the floor after the end of the walking course.

Enter

1 to continue.

Range: 1..1

**MMTRYA**

INTERVIEWER: Record results of first trial.

Enter time at next question.

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

4 Respondent refused

*IF MmTrya = Success [MmTrya = Success]*

**MMWLKA**

INTERVIEWER:Record time in seconds to two decimal places.

**MMWALB**

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

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

**MMTRYB**

INTERVIEWER:Record result of second trial.

Enter time at next question.

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

*IF MmTryb = Success [MmTryb = Success]*

**MMWLKB**

INTERVIEWER:Record time in seconds to two decimal places.

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF IAgeOF >= 60 [IAgeOF >= 60]*

*IF (QMM2.Qre.MmTrya = Success) OR (QMM2.Qre.MmTryb = Success)*

*[QMM2.Qre.MmTrya = Success OR QMM2.Qre.MmTryb = Success]*

**MMPAIN**

INTERVIEWER: Code if respondent has commented on pain,

OTHERWISE ASK: 'Did you have pain while you were performing the walking test?'

- 1 Yes
- 2 No

MMRECR

INTERVIEWER: Record type of floor surface.

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

*IF MmRecR = Other [MmRecR = Other]*

MMRECRO

INTERVIEWER: Enter other type of floor surface.

String: 20

END FILTER

MMAID

INTERVIEWER: Record type of aid used.

- 1 None
- 2 Walking stick or cane
- 3 Elbow crutches
- 4 Walking frame
- 5 Others
- 85 ONCode
- 86 Irrel

*IF MmAid = Other [MmAid = Other]*

MMAIDO

INTERVIEWER: Enter other type of aid used.

String: 20

END FILTER

END FILTER

*IF NOT ((QMM2.Qre[MPNo].MmTrya = Success) AND  
/ / / / (QMM2.Qre.MmTryb = Success)) [NOT QMM2.Qre.MmTrya = Success  
/ / / / AND QMM2.Qre.MmTryb = Success]*

MMCOM

INTERVIEWER: Provide details about why the walking test was not completed

| | | | | successfully, i.e. why it was stopped for safety reasons, refused, or not completed.

| | | | | Open

| | | | | *IF (MMCom = RESPONSE) AND (EditQre = Yes) [MMCom =*  
| | | | | *RESPONSE AND EditQre = 1]*

| | | | | **MMCOMZ**

| | | | | EDITOR: CODE FRAME 60

| | | | | MMCom :

- | | | | | 1 Unable to walk (safely)
  - | | | | | 2 Lack of space
  - | | | | | 3 Respondent refused
  - | | | | | 4 Interview not completed
  - | | | | | 5 Respondent in pain
  - | | | | | 85 Other answer - not codeable 01-05
  - | | | | | 86 Irrelevant response - not codeable 01-05
- | | | | | [code maximum 7 out of 7 possible responses]

| | | | | END FILTER

| | | | | END FILTER

| | | | | END FILTER

| | | | | *IF EditQre <> Yes [EditQre <> 1]*

| | | | | **MMX**

| | | | | INTERVIEWER: The Measurements Interview is finished.

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

| | | | | **MTHANK**

| | | | | INTERVIEWER: The Measurements Interview is finished.

- | | | | | - to return to the Individual
- | | | | | Qre, press <Ctrl Enter>
- | | | | | - to start another Individual Qre, press <Ctrl Enter>
- | | | | | - to
- | | | | | update the Admin details, press <Ctrl Enter>
- | | | | | 1 Press <1> and <Enter> to continue.

| | | | | END FILTER

| | | | | END FILTER

P2496/BLUE

Serial number

--	--	--	--	--	--	--	--	--	--

1-9

CK

10

Person

--	--

11-12

First name

Card

0	2
---	---

13-14

Batch 15-19

# Health and lifestyles of people aged 50 and over

## Self-Completion Questionnaire In Confidence

### HOW TO FILL IN THIS QUESTIONNAIRE

Please answer the questions by:

Ticking a box like this

Or writing a number in a box like this

Sometimes you will find an instruction telling you which questions to answer next like this:

Yes

No  Go to

### HOW TO RETURN THIS QUESTIONNAIRE

If the interviewer is still in your home when you have completed the questionnaire, please hand it back to them. If not, please return the completed questionnaire in the pre-paid envelope as soon as you possibly can.

**PLEASE START THE QUESTIONNAIRE AT QUESTION  ON THE NEXT PAGE**

**THANK YOU AGAIN FOR YOUR HELP**

## 1 Which of these statements apply to you?

*Tick all that apply*

- I voted in the last General Election  01
- I read a daily newspaper  02
- I have a hobby or pastime  03
- I have taken a holiday in the UK in the last 12 months  04
- I have taken a holiday abroad in the last 12 months  05
- I have gone on a daytrip or outing in the last 12 months  06
- I use the internet and/or email  07
- I own a mobile phone  08
- 
- None of these statements apply to me  09

## 2 Are you a member of any of these organisations, clubs or societies?

*Tick all that apply*

- Political party, trade union or environmental groups  01
- Tenants groups, resident groups, Neighbourhood Watch  02
- Church or other religious groups  03
- Charitable associations  04
- Education, arts or music groups or evening classes  05
- Social clubs  06
- Sports clubs, gyms, exercise classes  07
- Any other organisations, clubs or societies  08
- 
- No, I am not a member of any organisations, clubs or societies  09
- Go to **3**
- Go to **4**

## 3 Thinking about all the organisations, clubs or societies that you are a member of, how many committee meetings, if any, do you attend in a year?

Please write the number in this box

4

**Now some questions about your social activities. How often, if at all, do you do any of the following activities?**

*Tick one box on each line*

Twice a month or more    About once a month    Every few months    About once or twice a year    Less than once a year    Never

Go to the cinema  1     2     3     4     5     6    54

Eat out of the house  1     2     3     4     5     6    55

Go to an art gallery or museum  1     2     3     4     5     6    56

Go to the theatre, a concert or the opera  1     2     3     4     5     6    57

5

**Would you like to do any of the following activities more often but feel that, for whatever reason, you cannot?**

*Tick one box on each line*

Yes    No

Go to the cinema  1     2    58

Eat out of the house  1     2    59

Go to an art gallery or museum  1     2    60

Go to the theatre, a concert or the opera  1     2    61

## 6

## We should like to know how your health has been in general over the past few weeks

Have you recently...

*Tick one box on each line*

	Better than usual	Same as usual	Less than usual	Much less than usual	
...been able to concentrate on whatever you're doing?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	62
	Not at all	No more than usual	Rather more than usual	Much more than usual	
...lost much sleep over worry?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	63
	More so than usual	Same as usual	Less useful than usual	Much less useful	
...felt you were playing a useful part in things?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	64
	More so than usual	Same as usual	Less so than usual	Much less capable	
...felt capable of making decisions?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	65
	Not at all	No more than usual	Rather more than usual	Much more than usual	
...felt constantly under strain?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	66
	Not at all	No more than usual	Rather more than usual	Much more than usual	
...felt you couldn't overcome your difficulties?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	67
	More so than usual	Same as usual	Less so than usual	Much less than usual	
...been able to enjoy your normal day-to-day activities?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	68
	More so than usual	Same as usual	Less able than usual	Much less able	
...been able to face up to your problems?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	69
	Not at all	No more than usual	Rather more than usual	Much more than usual	
...been feeling unhappy and depressed?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	70
	Not at all	No more than usual	Rather more than usual	Much more than usual	
...been losing confidence in yourself?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	71

	Not at all	No more than usual	Rather more than usual	Much more than usual	
...been thinking of yourself as a worthless person?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	72

	More so than usual	About same as usual	Less so than usual	Much less than usual	
...been feeling reasonably happy, all things considered?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	73

**7 Please say how much you agree or disagree with the following statements.**

*Tick one box on each line*

	Strongly agree	Agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Disagree	Strongly disagree
--	----------------	-------	----------------	----------------------------	-------------------	----------	-------------------

In most ways my life is close to my ideal	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	74
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

The conditions of my life are excellent	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	75
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

I am satisfied with my life	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	76
-----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

So far I have got the important things I want in life	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	77
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

If I could live my life again, I would change almost nothing	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	78
--	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

**8 Here are some questions about how you feel about your life in general. Please say how much you agree or disagree with the following statements.**

*Tick one box on each line*

	Strongly agree	Moderately agree	Slightly agree	Slightly disagree	Moderately disagree	Strongly disagree
--	----------------	------------------	----------------	-------------------	---------------------	-------------------

At home, I feel I have control over what happens in most situations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	79
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

I feel that what happens in life is often determined by factors beyond my control	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	80
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

In general, I have different demands that I think are hard to combine	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	81
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

In general, I have enough time to do everything	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	82
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

Considering the things I have to do at home, I have to work very fast	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	83
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----

9

**Here is a list of statements that people have used to describe their lives or how they feel. How often, do you feel like this?**

*Tick one box on each line*

Often    Some-  
times    Not  
Often    Never

My age prevents me from doing the things I would like to  1  2  3  4 84

I feel that what happens to me is out of my control  1  2  3  4 85

I feel free to plan for the future  1  2  3  4 86

I feel left out of things  1  2  3  4 87

I can do the things that I want to do  1  2  3  4 88

Family responsibilities prevent me from doing what I want to do  1  2  3  4 89

I feel that I can please myself what I do  1  2  3  4 90

My health stops me from doing things I want to do  1  2  3  4 91

Shortage of money stops me from doing the things I want to do  1  2  3  4 92

I look forward to each day  1  2  3  4 93

I feel that my life has meaning  1  2  3  4 94

I enjoy the things that I do  1  2  3  4 95

I enjoy being in the company of others  1  2  3  4 96

On balance, I look back on my life with a sense of happiness  1  2  3  4 97

I feel full of energy these days  1  2  3  4 98

I choose to do things that I have never done before  1  2  3  4 99

I feel satisfied with the way my life has turned out  1  2  3  4 100

I feel that life is full of opportunities  1  2  3  4 101

I feel that the future looks good for me  1  2  3  4 102

10

The next questions are about how you feel about different aspects of your life. For each one, please say how often you feel that way.

Tick one box on each line

Hardly ever or never      Some of the time      Often

How often do you feel you lack companionship?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	103
How often do you feel left out?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	104
How often do you feel isolated from others?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	105
How often do you feel in tune with the people around you?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	106
How often do you feel lonely?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	107

11

How do you feel about your local area, that is everywhere within a 20 minute walk or about a mile of your home? Please tick one box on each line. The closer your tick is to a statement the more strongly you agree with it.

Tick one box on each line

I really feel part of this area	<input type="checkbox"/>	I feel that I don't belong in this area	108
	1 2 3 4 5 6 7		
Vandalism and graffiti are a big problem in this area	<input type="checkbox"/>	There is no problem with vandalism and graffiti in this area	109
	1 2 3 4 5 6 7		
I often feel lonely living in this area	<input type="checkbox"/>	I have never felt lonely living in this area	110
	1 2 3 4 5 6 7		
Most people in this area can be trusted	<input type="checkbox"/>	Most people in this area can't be trusted	111
	1 2 3 4 5 6 7		
People would be afraid to walk alone after dark in this area	<input type="checkbox"/>	People feel safe walking alone in this area after dark	112
	1 2 3 4 5 6 7		
Most people in this area are friendly	<input type="checkbox"/>	Most people in this area are unfriendly	113
	1 2 3 4 5 6 7		
People in this area will take advantage of you	<input type="checkbox"/>	People in this area will always treat you fairly	114
	1 2 3 4 5 6 7		
This area is kept very clean	<input type="checkbox"/>	This area is always full of litter and rubbish	115
	1 2 3 4 5 6 7		
If you were in trouble, there are lots of people in this area who would help you	<input type="checkbox"/>	If you were in trouble, there is nobody in this area who would help you	116
	1 2 3 4 5 6 7		

**12****Do you have a husband, wife or partner with whom you live?**

117

*Tick one box*Yes  <sup>1</sup> Go to **13**No  <sup>2</sup> Go to **15****13****We would now like to ask you some questions about your spouse or partner. Please tick the box which best shows how you feel about each statement.***Tick one box on each line*

A lot    Some    A little    Not at all

How much do they really understand the way you feel about things?  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> 118How much can you rely on them if you have a serious problem?  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> 119How much can you open up to them if you need to talk about your worries?  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> 120How much do they criticise you?  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> 121How much do they let you down when you are counting on them?  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> 122How much do they get on your nerves?  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> 123**14****How close is your relationship with your spouse or partner?**

124

*Tick one box*Very close  <sup>1</sup>Quite close  <sup>2</sup>Not very close  <sup>3</sup>Not at all close  <sup>4</sup>

**15 Do you have any children?**

*Tick one box*

Yes  1 **Go to 16**

No  2 **Go to 19**

**16 We would now like to ask you some questions about your children. Please tick the box which best shows how you feel about each statement.**

*Tick one box on each line*

A lot    Some    A little    Not at all

How much do they really understand the way you feel about things?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	126
How much can you rely on them if you have a serious problem?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	127
How much can you open up to them if you need to talk about your worries?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	128
How much do they criticise you?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	129
How much do they let you down when you are counting on them?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	130
How much do they get on your nerves?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	131

**17 On average, how often do you do each of the following with any of your children, not counting any who live with you?**

*Tick one box on each line*

Three or more times a week    Once or twice a week    Once or twice a month    Every few months    Once or twice a year    Less than once a year or never

Meet up (include both arranged and chance meetings)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	132
Speak on the phone	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	133
Write or email	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	134

**18 How many of your children would you say you have a close relationship with?**

Please write the number in this box

**19** Do you have any other immediate family, for example, any brothers or sisters, parents, cousins or grandchildren?

Tick one box

Yes  1 Go to **20**

No  2 Go to **23**

**20** We would now like to ask you some questions about these family members. Please tick the box which best shows how you feel about each statement.

Tick one box on each line

	A lot	Some	A little	Not at all	
How much do they really understand the way you feel about things?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	138
How much can you rely on them if you have a serious problem?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	139
How much can you open up to them if you need to talk about your worries?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	140
How much do they criticise you?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	141
How much do they let you down when you are counting on them?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	142
How much do they get on your nerves?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	143

**21** On average, how often do you do each of the following with any of these family members, not counting any who live with you?

Tick one box on each line

	Three or more times a week	Once or twice a week	Once or twice a month	Every few months	Once or twice a year	Less than once a year or never	
Meet up (include both arranged and chance meetings)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	144
Speak on the phone	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	145
Write or email	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	146

**22** How many of these family members would you say you have a close relationship with?

147-148

Please write the number in this box

**23 Do you have any friends?**

*Tick one box*

Yes  1 **Go to 24**

No  2 **Go to 27**

**24 We would now like to ask you some questions about your friends. Please tick the box which best shows how you feel about each statement.**

*Tick one box on each line*

A lot      Some      A little      Not at all

How much do they really understand the way you feel about things?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	150
How much can you rely on them if you have a serious problem?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	151
How much can you open up to them if you need to talk about your worries?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	152
How much do they criticise you?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	153
How much do they let you down when you are counting on them?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	154
How much do they get on your nerves?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	155

**25 On average, how often do you do each of the following with any of your friends, not counting any who live with you?**

*Tick one box on each line*

Three or more times a week      Once or twice a week      Once or twice a month      Every few months      Once or twice a year      Less than once a year or never

Meet up (include both arranged and chance meetings)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	156
Speak on the phone	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	157
Write or email	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	158

**26 How many of your friends would you say you have a close relationship with?**

Please write the number in this box

**27****Were you in paid employment last month?**

161

*Tick one box*Yes  1 **Go to 28**No  2 **Go to 30****28****Here are some statements people might use to describe their work. We would like to know how strongly you think these apply to the paid employment you did in the last month.***Tick one box on each line*

	Strongly agree	Agree	Disagree	Strongly disagree	
All things considered I am satisfied with my job	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	162
My job is physically demanding	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	163
I receive the recognition I deserve for my work	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	164
My salary is adequate	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	165
My job promotion prospects are poor	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	166
My job security is poor	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	167
I am under constant time pressure due to a heavy workload	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	168
I have very little freedom to decide how I do my work	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	169
I have the opportunity to develop new skills	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	170
I receive adequate support in difficult situations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	171
At work, I feel I have control over what happens in most situations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	172
Considering the things I have to do at work, I have to work very fast	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	173

**29****At what age would you like to retire?**

174-176

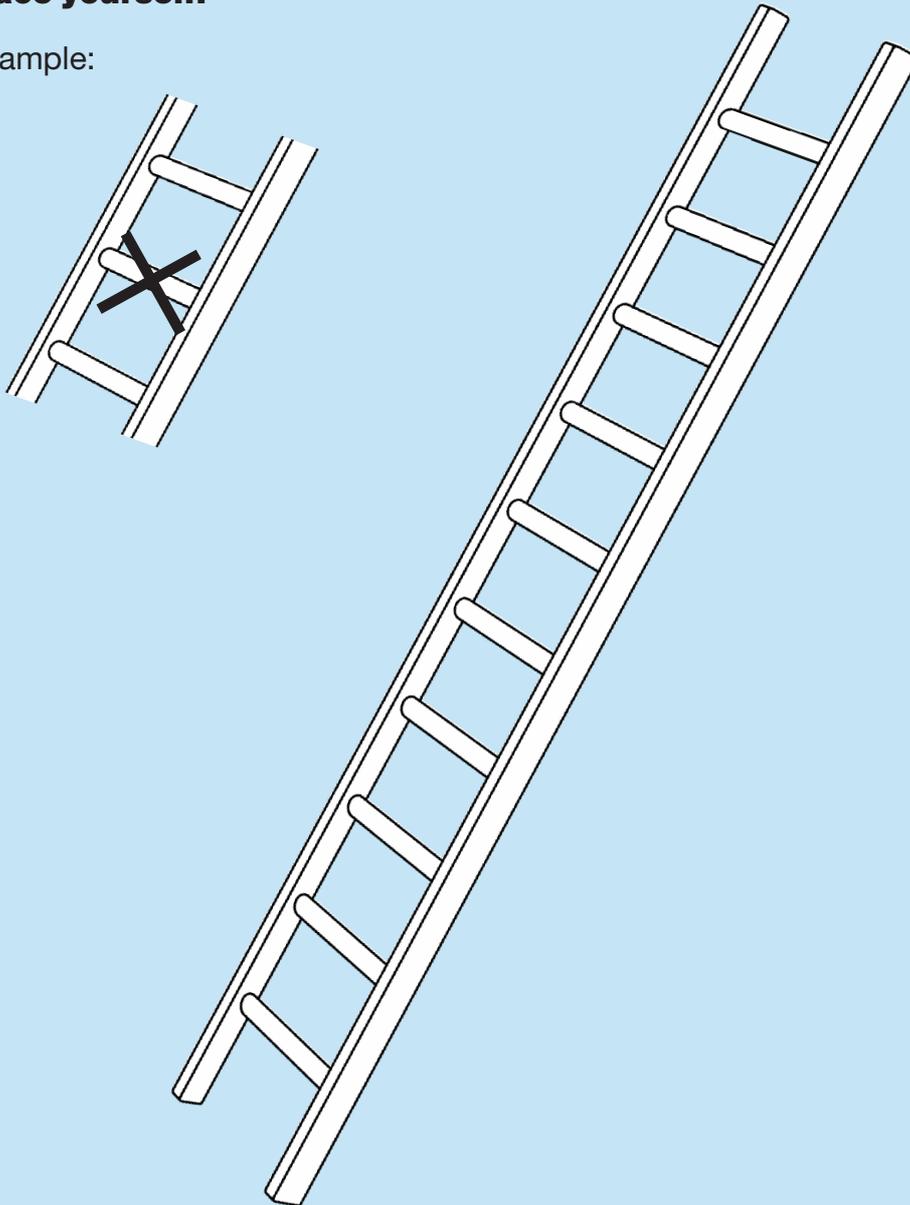
Write in years I have already retired  996

30

Think of this ladder as representing where people stand in our society. At the top of the ladder are the people who are the best off – those who have the most money, most education and best jobs. At the bottom are the people who are the worst off – who have the least money, least education, and the worst jobs or no jobs. The higher up you are on this ladder, the closer you are to the people at the very top and the lower you are, the closer you are to the people at the very bottom.

Please mark a cross on the rung on the ladder where you would place yourself.

Example:



177-179

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31

Has your position on the ladder changed within the last two years?

180

Tick one box

Yes, I have moved up  1

Yes, I have moved down  2

No, my position has not changed  3

**32** Thinking now about all kinds of drinks, how often have you had an alcoholic drink of any kind during the last 12 months?

*Tick one box*

- |                             |                          |   |                   |
|-----------------------------|--------------------------|---|-------------------|
| Almost every day            | <input type="checkbox"/> | 1 |                   |
| Five or six days a week     | <input type="checkbox"/> | 2 |                   |
| Three or four days a week   | <input type="checkbox"/> | 3 |                   |
| Once or twice a week        | <input type="checkbox"/> | 4 | → Go to <b>33</b> |
| Once or twice a month       | <input type="checkbox"/> | 5 |                   |
| Once every couple of months | <input type="checkbox"/> | 6 |                   |
| Once or twice a year        | <input type="checkbox"/> | 7 |                   |
- 
- |                                  |                          |   |                 |
|----------------------------------|--------------------------|---|-----------------|
| Not at all in the last 12 months | <input type="checkbox"/> | 8 | Go to <b>36</b> |
|----------------------------------|--------------------------|---|-----------------|

**33** Did you have an alcoholic drink in the seven days ending yesterday?

*Tick one box*

- |     |                          |   |                 |
|-----|--------------------------|---|-----------------|
| Yes | <input type="checkbox"/> | 1 | Go to <b>34</b> |
| No  | <input type="checkbox"/> | 2 | Go to <b>36</b> |

**34** On how many days out of the last seven did you have an alcoholic drink?

*Tick one box*

- |       |                          |   |                   |
|-------|--------------------------|---|-------------------|
| One   | <input type="checkbox"/> | 1 |                   |
| Two   | <input type="checkbox"/> | 2 |                   |
| Three | <input type="checkbox"/> | 3 |                   |
| Four  | <input type="checkbox"/> | 4 | → Go to <b>35</b> |
| Five  | <input type="checkbox"/> | 5 |                   |
| Six   | <input type="checkbox"/> | 6 |                   |
| Seven | <input type="checkbox"/> | 7 |                   |

**35**

**Please think about the day in the last week on which you drank the most. (If you drank the same amount on more than one day, please answer about the most recent of those days.)**

**From this list, please tick all the types of alcoholic drink which you drank on that day.**

**For the ones you drank, write in how much you drank on that day.**

**EXCLUDE NON-ALCOHOLIC OR LOW-ALCOHOL DRINKS, EXCEPT SHANDY.**

Tick all drinks drunk on that day		Write in how much drunk on that day						
		Glasses (Count doubles as 2 singles)	Pints	Large cans or bottles	Small cans or bottles			
<small>184-199</small> Normal strength beer, lager, stout, cider or shandy (less than 6% alcohol) – exclude bottles/cans of shandy <input type="checkbox"/> 01			<input type="text"/>	<input type="text"/>	<input type="text"/>	<small>200-207</small>		
Strong beer, lager, stout or cider (6% alcohol or more, such as Tennants Extra, Special Brew, Diamond White) <input type="checkbox"/> 02			<input type="text"/>	<input type="text"/>	<input type="text"/>	<small>208-215</small>		
Spirits or liqueurs, such as gin, whisky, rum, brandy, vodka, or cocktails <input type="checkbox"/> 03		<input type="text"/>				<small>216-217</small>		
Sherry or martini (including port, vermouth, cinzano, dubonnet) <input type="checkbox"/> 04		<input type="text"/>				<small>218-219</small>		
Wine (including babycham and champagne) <input type="checkbox"/> 05		<input type="text"/>				<small>220-221</small>		
Alcoholic soft drinks or 'alcopops' (such as Barcardi Breezer, Smirnoff Ice) <input type="checkbox"/> 06					<input type="text"/>	<small>222-223</small>		
Other kinds of alcoholic drink <b>Write in name of drink</b>								
1	<input type="text"/>	<input type="checkbox"/>	07	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<small>224-225</small>
2	<input type="text"/>	<input type="checkbox"/>	08	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<small>226-227</small>

**36****Using the measures below, how much of the following did you eat yesterday?***Please read through the whole list before answering.**For each food type, write '0' if none eaten.***Write in number**

Salad (cereal bowlfuls)	<input type="text"/>	<input type="text"/>	228-229
Tablespoons of vegetables (raw, cooked, frozen or tinned) <i>Include peas and greens. Do not include potatoes</i>	<input type="text"/>	<input type="text"/>	230-231
Tablespoons of pulses such as baked beans, red kidney beans, lentils	<input type="text"/>	<input type="text"/>	232-233
Tablespoons of other dishes mainly made from vegetables or pulses, such as vegetable lasagne or vegetable curry	<input type="text"/>	<input type="text"/>	234-235

**37****Using the measures below, how much of the following did you eat yesterday?***Please read through the whole list before answering.**For each food type, write '0' if none eaten.***Write in number**

Average handfuls of very small fruit, such as grapes, berries	<input type="text"/>	<input type="text"/>	236-237
Small fruit, such as plums, satsumas	<input type="text"/>	<input type="text"/>	238-239
Medium fruit, such as apples, bananas, oranges	<input type="text"/>	<input type="text"/>	240-241
Half a large fruit, such as grapefruit	<input type="text"/>	<input type="text"/>	242-243
Average slices of a very large fruit, such as melon	<input type="text"/>	<input type="text"/>	244-245
Tablespoons of frozen or tinned fruit	<input type="text"/>	<input type="text"/>	246-247
Tablespoons of dried fruit, such as raisins, apricots	<input type="text"/>	<input type="text"/>	248-249
Tablespoons of other dishes made mainly from fruit such as fruit salad or fruit pies	<input type="text"/>	<input type="text"/>	250-251
Small glasses of fruit juice	<input type="text"/>	<input type="text"/>	252-253

**38****If there is anything else you would like to tell us, please write in the space below. We shall be very interested to read what you have to say.**

254

**Thank you very much for taking the time to answer our questions.  
Please give the questionnaire to the interviewer or post it back in the envelope provided. All your answers will remain confidential.**

P2496/GREEN

Serial number

--	--	--	--	--	--	--	--	--	--

1-9

CK

10

Person

--	--

11-12

First name

Card

0	4
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13-14

Batch 15-19

# Health and lifestyles of people aged 50 and over

## Health Self-Completion Questionnaire

In Confidence

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### HOW TO FILL IN THIS QUESTIONNAIRE

Please answer the questions by:

Ticking a box like this

---

### HOW TO RETURN THIS QUESTIONNAIRE

If the interviewer is still in your home when you have completed the questionnaire, please hand it back to them. If not, please return the completed questionnaire in the pre-paid envelope as soon as you can.

---

**PLEASE START THE QUESTIONNAIRE AT QUESTION **1** ON PAGE 3**

**THANK YOU AGAIN FOR YOUR HELP**

---

# We would like to ask you questions about your own health.

Please tick one box for each question.

1

Overall in the last 30 days, what degree of aches and pains have you had?

20

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

2

In the last 30 days, how much difficulty have you had with sleeping, such as falling asleep, waking up frequently during the night or waking up too early in the morning?

21

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

3

Overall in the last 30 days, how much of a problem have you had with moving around?

22

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

4

Overall in the last 30 days how much difficulty have you had with concentrating or remembering things?

23

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

5

In the last 30 days, how much of a problem have you had because of shortness of breath?

24

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

6

Overall in the last 30 days, how much of a problem have you had with feeling sad, low, or depressed?

25

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

7

How much are you limited in the kind or amount of work that you can do due to an impairment or health problem?

26

Not limited      Mildly      Moderately      Severely      Extremely

1       2       3       4       5

**We will give you some examples of people with serious and less serious health problems. We would like to know how you evaluate the health of these people. Please assume that the people have the same age and background that you have.**

**Please tick one box for each question.**

**8**

**Paul has a headache once a month that is relieved after taking a pill. During the headache he can carry on with his day-to-day affairs.**

27

Overall in the last 30 days, what degree of aches and pains did Paul have?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**9**

**Carol takes about two hours to fall asleep every night. She wakes up once or twice a night feeling panicked and takes more than an hour to fall asleep again.**

28

In the last 30 days, how much difficulty did Carol have with sleeping, such as falling asleep, waking up frequently during the night or waking up too early in the morning?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**10**

**Henry has pain that radiates down his right arm and wrist during his day at work. This is slightly relieved in the evenings when he is no longer working on his computer.**

29

Overall in the last 30 days, what degree of aches and pains did Henry have?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**11**

**Margaret wakes up almost once every hour during the night. When she wakes up in the night, it takes around 15 minutes for her to go back to sleep. In the morning she does not feel well-rested.**

30

In the last 30 days, how much difficulty did Margaret have with sleeping, such as falling asleep, waking up frequently during the night or waking up too early in the morning?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**12**

**John has pain in his knees, elbows, wrists and fingers, and the pain is present almost all the time. Although medication helps, he feels uncomfortable when moving around, holding and lifting things.**

31

Overall in the last 30 days, what degree of aches and pains did John have?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**13**

**Alice falls asleep easily at night, but two nights a week she wakes up in the middle of the night and cannot go back to sleep for the rest of the night.**

32

In the last 30 days, how much difficulty did Alice have with sleeping, such as falling asleep, waking up frequently during the night or waking up too early in the morning?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**14**

**Tom has a lot of swelling in his legs due to his health condition. He has to make an effort to walk around his home as his legs feel heavy.**

33

Overall in the last 30 days, how much of a problem did Tom have with moving around?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**15**

**Mary can concentrate while watching TV, reading a magazine or playing a game of cards or chess. Once a week she forgets where her keys or glasses are, but finds them within five minutes.**

34

Overall in the last 30 days, how much difficulty did Mary have with concentrating or remembering things?

None	Mild	Moderate	Severe	Extreme
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**16**

**David does not exercise. He cannot climb stairs or do other physical activities because he is obese. He is able to carry the groceries and do some light household work.**

35

Overall in the last 30 days, how much of a problem did David have with moving around?

None Mild Moderate Severe Extreme  
 1  2  3  4  5

**17**

**Sue is keen to learn new recipes but finds that she often makes mistakes and has to reread them several times before she is able to do them properly.**

36

Overall in the last 30 days, how much difficulty did Sue have with concentrating and remembering things?

None Mild Moderate Severe Extreme  
 1  2  3  4  5

**18**

**Robert is able to walk distances of up to 200 metres without any problems but feels tired after walking one kilometre or climbing more than one flight of stairs. He has no problems with day-to-day activities, such as carrying food from the market.**

37

Overall in the last 30 days, how much of a problem did Robert have with moving around?

None Mild Moderate Severe Extreme  
 1  2  3  4  5

**19**

**Eve cannot concentrate for more than 15 minutes and has difficulty paying attention to what is being said to her. When she starts a task, she never manages to finish it and often forgets what she was doing. She is able to learn the names of people she meets.**

38

Overall in the last 30 days, how much difficulty did Eve have with concentrating or remembering things?

None Mild Moderate Severe Extreme  
 1  2  3  4  5

**20****Eric has no problems with walking slowly. He gets out of breath easily when climbing uphill for 20 metres or a flight of stairs.**

39

In the last 30 days, how much of a problem did Eric have because of shortness of breath?

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**21****Ann feels depressed most of the time. She weeps frequently and feels hopeless about the future. She feels that she has become a burden on others and that she would be better dead.**

40

Overall in the last 30 days, how much of a problem did Ann have with feeling sad, low, or depressed?

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**22****Michael suffers from respiratory infections about once every year. He is short of breath 3 or 4 times a week and had to be admitted to hospital twice in the past month with a bad cough that required treatment with antibiotics.**

41

In the last 30 days, how much of a problem did Michael have because of shortness of breath?

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**23****Patricia feels nervous and anxious. She worries and thinks negatively about the future, but feels better in the company of people or when doing something that really interests her. When she is alone she tends to feel useless and empty.**

42

Overall in the last 30 days, how much of a problem did Patricia have with feeling sad, low, or depressed?

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**24**

**Peter has been a heavy smoker for 30 years and wakes up with a cough every morning. He gets short of breath even while resting and does not leave the house anymore. He often needs to be put on oxygen.**

43

In the last 30 days, how much of a problem did Peter have because of shortness of breath?

None      Mild      Moderate      Severe      Extreme  
 1       2       3       4       5

**25**

**Jean enjoys her work and social activities and is generally satisfied with her life. She gets depressed every three weeks for a day or two and loses interest in what she usually enjoys but is able to carry on with her day-to-day activities.**

44

Overall in the last 30 days, how much of a problem did Jean have with feeling sad, low, or depressed?

None      Mild      Moderate      Severe      Extreme  
 1       2       3       4       5

**26**

**If there is anything else you would like to tell us on this topic, please write in the space below. We shall be very interested to read what you have to say.**

45

**Thank you very much for taking the time to answer our questions. Please give the questionnaire to the interviewer or post it back in the envelope provided. All your answers will remain confidential.**

P2496/YELLOW

Serial number

--	--	--	--	--	--	--	--	--	--

1-9

CK

10

Person

--	--

11-12

First name

Card

0	3
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13-14

Batch 15-19

# Health and lifestyles of people aged 50 and over

## Work Self-Completion Questionnaire

In Confidence

---

### HOW TO FILL IN THIS QUESTIONNAIRE

Please answer the questions by:

Ticking a box like this

---

### HOW TO RETURN THIS QUESTIONNAIRE

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---

**PLEASE START THE QUESTIONNAIRE AT QUESTION **1** ON THE NEXT PAGE**

**THANK YOU AGAIN FOR YOUR HELP**

---

# We would like to ask you questions about your own health.

Please tick one box for each question.

**1**

**Overall in the last 30 days, what degree of aches and pains have you had?**

20

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**2**

**In the last 30 days, how much difficulty have you had with sleeping, such as falling asleep, waking up frequently during the night or waking up too early in the morning?**

21

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**3**

**Overall in the last 30 days, how much of a problem have you had with moving around?**

22

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**4**

**Overall in the last 30 days how much difficulty have you had with concentrating or remembering things?**

23

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**5**

**In the last 30 days, how much of a problem have you had because of shortness of breath?**

24

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**6**

**Overall in the last 30 days, how much of a problem have you had with feeling sad, low, or depressed?**

25

None      Mild      Moderate      Severe      Extreme

1       2       3       4       5

**7**

**How much are you limited in the kind or amount of work that you can do due to an impairment or health problem?**

26

Not limited      Mildly      Moderately      Severely      Extremely

1       2       3       4       5

**We would like to give you some examples of people with health problems. We would like you to indicate the extent to which you think these people would be limited in the kind or amount of work they can do. Please assume that the people have the same age, education and work history that you have. Other than the conditions mentioned, you should imagine the individual is in reasonably good health.**

**Please tick one box for each question.**

**8**

**Elizabeth has almost constant pain in her back and this sometimes prevents her from doing her work.**

27

How much is Elizabeth limited in the kind or amount of work she could do?

Not limited	Mildly	Moderately	Severely	Extremely
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**9**

**Geoffrey suffers from back pain that causes stiffness in his back especially at work but it is relieved with low doses of medication. He does not have any pains other than this generalised discomfort.**

28

How much is Geoffrey limited in the kind or amount of work he could do?

Not limited	Mildly	Moderately	Severely	Extremely
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**10**

**Christine has pain in her back and legs, and the pain is present almost all the time. It gets worse while she is working. Although medication helps, she feels uncomfortable when moving around, holding and lifting things at work.**

29

How much is Christine limited in the kind or amount of work she could do?

Not limited	Mildly	Moderately	Severely	Extremely
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**11**

**Richard feels worried all the time. He gets depressed once a week at work for a couple of days in a row, thinking about what could go wrong and that his boss will disapprove of his condition. But he is able to come out of this mood if he concentrates on something else.**

30

How much is Richard limited in the kind or amount of work he could do?

Not limited	Mildly	Moderately	Severely	Extremely
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**12**

**Katherine has mood swings whilst at work. When she gets depressed, everything she does at work is an effort for her and she no longer enjoys her usual activities at work. These mood swings are not predictable and occur two or three times a month.**

31

How much is Katherine limited in the kind or amount of work she could do?

Not limited	Mildly	Moderately	Severely	Extremely
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**13** Anthony generally enjoys his work. He gets depressed every three weeks for a day or two and loses interest in what he usually enjoys but is able to carry on with his day-to-day activities at work.

32

How much is Anthony limited in the kind or amount of work he could do?

	Not limited	Mildly	Moderately	Severely	Extremely
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**14** Linda has had heart problems in the past and she has been told to watch her cholesterol level. Sometimes if she feels stressed at work she feels pain in her chest and occasionally in her arms.

33

How much is Linda limited in the kind or amount of work she could do?

	Not limited	Mildly	Moderately	Severely	Extremely
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**15** Colin has been diagnosed with high blood pressure. His blood pressure goes up quickly if he feels under stress. Colin does not exercise much and is overweight.

34

How much is Colin limited in the kind or amount of work he could do?

	Not limited	Mildly	Moderately	Severely	Extremely
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**16** Jennifer has undergone triple bypass heart surgery. She is a heavy smoker and still experiences severe chest pain sometimes.

35

How much is Jennifer limited in the kind or amount of work she could do?

	Not limited	Mildly	Moderately	Severely	Extremely
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**17** If there is anything else you would like to tell us on this topic, please write in the space below. We shall be very interested to read what you have to say.

36

**Thank you very much for taking the time to answer our questions. Please give the questionnaire to the interviewer or post it back in the envelope provided. All your answers will remain confidential.**

# **English Longitudinal Study of Ageing**

## **END OF LIFE**

**Wave Three END OF LIFE Questionnaire – 2006 to 2007**

**Prepared by NatCen**

**Version 1.0 MAY 2015**

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## **IMPORTANT INFORMATION ABOUT THE PAPER VERSION OF THE QUESTIONNAIRE**

### **Textfills**

^ - This annotation is shown before any textfills that were used in questions. The different options of the textfill are provided in square brackets e.g. [^him/her].

### **Routing**

<> - This annotation is used to indicate 'not equals to'.

### **Variables omitted from archived data**

@ - This annotation is used to indicate that a variable has not been archived (with this name). If the data for such a variable has been archived under a different name this will be indicated. Some variables have been omitted altogether from the archived data (e.g. text variables or "press 1 and continue" variables) – see User Guide for more information. Some have been converted to group the data to reduce disclosiveness.

@@ - This annotation is used to indicate that a financial variable has not been archived for reasons of disclosiveness. Small quantities of data mean it has not been converted into a non-disclosive derived variable either.

### **Checks**

The CAPI instrument contains a number of checks to help ensure that the information entered by the interviewer is accurate and consistent. The checks included in the End of Life questionnaire are not included within this documentation. If information is needed about checks please contact the ELSA team.

### **Queries**

Please contact the data manager ([ELSAdata@natcen.ac.uk](mailto:ELSAdata@natcen.ac.uk)) if you have any queries about the questionnaire.

**Version 1.0 MAY 2015**

# WAVE 3 ELSA

## End of Life interview

### *About the respondent*

#### **SERIAL @**

Serial Number

Range: 1..9999999999

[Don't Know and Refusal are not allowed]

#### **FIRST @**

INTERVIEWER: For your information:.. You are in the questionnaire for serial number [Serial] - To enter the questionnaire press and . - To update the Admin details, press .1 Press and to continue.

#### **INTDAT @ (See INTDATMM and INTDATYY for month and year of interview)**

INTERVIEWER: Today's date. Amend if not correct. Else, press to continue.

[Don't Know and Refusal are not allowed]

ELSE

|

#### **DECEASED ELSA RESPONDENT'S NAME @**

| ELSA respondent's first name.

| STRING 30

|

#### **EINAME2 @**

| ELSA respondent's surname.

| STRING 30

|

#### **EIDATLA @ (See EIDatLaMM and EIDatLAYY for month and year of last interview)**

| Date of last ELSA interview

|

END FILTER

(EiSex included in dataset but not in questionnaire – sex of deceased)

#### **EIINTRO @**

You may be aware that [^deceased ELSA respondent's name] generously participated in the ELSA study before

[^his/her] death. [^His/Her] contribution was very valuable. We would find it extremely helpful to have some information about the last year or two of [^his/her] life. I appreciate that this may upset or distress you. All the information collected is strictly confidential, and will be held anonymously.

INTERVIEWER: Press 1 and to continue.

Range: 1..1

#### **EIINTR2 @**

Before we begin, I'd like to ask you some questions about you.

1 Continue

**EIRREL**

SHOW CARD EI1

What was your relationship to [^deceased ELSA respondent's name]? Were you [^his/her]...

- 01 Husband/Wife
- 02 Partner/cohabitee
- 03 Natural son/daughter
- 04 Adopted son/daughter
- 05 Foster son/daughter
- 06 Step-son/step-daughter/child of partner
- 07 Son-in-law/daughter-in-law
- 08 Natural parent
- 09 Adoptive parent
- 10 Foster parent
- 11 Step-parent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother-in-law/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative (specify)
- 22 Other non-relative (specify)

*IF Relationship was other relative or other non relative [EiRRel = 21 or 22]*

| **EIRRELOT @**

| INTERVIEWER: The respondent has answered 'other' relationship: Write in relationship to [^deceased ELSA respondent's name].

| STRING 100

*IF Relationship was other non relative [EiRRel = 22]*

| | **EIRFRI**

| | Would you say [^he/she] was a close friend, or not?

- | | 1 Yes
- | | 2 No
- | | 3 Other

| | END FILTER

END FILTER

*IF NOT a spouse or partner [(EiRRel <> 1 and EiRRel <> 2)]*

| **SURVSP**

| INTERVIEWER ASK OR CODE: Did [^deceased ELSA respondent's name] have a surviving spouse/partner at the time of [^his/her] death?

- | 1 Yes
- | 2 No

END FILTER

*If respondent is not a child, parent, sibling or grandparent [ NOT(Eirrel IN [NatCh, NatPar, NatSib, Grandch, GrandPar])]*

**EIRKNO**

How long had you known [^him/her]?

READ OUT...

- 1 ...more than one month, but less than one year,
- 2 ...between one and two years,
- 3 ...over two years?

*IF How long had you known =up to one or two years [EIRKNO= 1 or 2]*

| **NUMMTH**

| INTERVIEWER: Enter the number of months the respondent has known the deceased.

| Range: 0..11

END OF FILTER

*IF How long had you known = over two years [EIRKNO= 3]*

| **NUMYR**

| INTERVIEWER: Enter the number of years the respondent has known the deceased.

| Range: 0..97

| |  
| | END FILTER

| END FILTER

END FILTER

**EIRAGE @** (DVEIRAGE includes aged 90 and over collapsed to avoid disclosure)

What was your age last birthday?

Range: 0..120

**EIRSEX**

INTERVIEWER: Ask or code respondent's sex.

- 1 Male
- 2 Female

## Scenario of ELSA respondent's death

### EILONG

I would now like to ask you a few questions about things that happened at the time of [^deceased ELSA respondent's name]'s death. How long had [^he/she] been ill before [^he/she] died?

- 1 Was not ill, died suddenly
- 2 Less than 24 hours
- 3 One day or more, but less than one week
- 4 One week or more but less than one month
- 5 One month or more but less than 6 months
- 6 6 months or more but less than a year
- 7 One year or more
- 8 Don't know

*IF death was sudden [EiLong =1]*

### EISUDD

Would you say [^his/her] death was unexpected?

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

*IF death was not unexpected [EiSudd = No]*

### EISUDEX @

Why was [^his/her] death expected?

STRING 200

END FILTER

ELSE

*IF Death was not sudden [(EiLong 2...9)] OR (EiLong = / REFUSAL)]*

### EIEXPT

Would you say [^his/her] death was expected, or unexpected?

- 1 Expected
- 2 Unexpected
- 95 Other (please specify at next question)
- 96 Don't know

*IF Other answer in would you say death was expected [EiExPt = Other]*

### EIEXPTOT @

INTERVIEWER: Enter details.

STRING 250

END FILTER

END FILTER

|  
END FILTER

**EICAUS @** (See DCEiCaus for backcoded and summarized variable to avoid non-disclosure)

SHOW CARD EI2

What was the main cause of [^deceased ELSA respondent's name]'s death?

- 1 Cancer
- 2 Heart Attack
- 3 Stroke
- 4 Other cardiovascular related illness
- 5 Respiratory disease
- 95 Other (Please specify)
- 96 Don't know

*IF cause of death was other [EiCaus = Other]*

|  
**EICAUSOT @**

| INTERVIEWER: Please enter details of the cause of death.

| STRING 200

|  
END FILTER

**EIDATED @**

May I ask, on what date did [^he/she] die?

INTERVIEWER: Enter the day of month at this question.

Range: 1..31

**EIDATEM @**

INTERVIEWER: Enter month at this question.

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

**EIDATEY**

INTERVIEWER: Enter year at this question.

Range: 2000..2050

## **EIPLAC**

And where did [^deceased ELSA respondent's name] die? Was it ...READ OUT...

- 01 ...at home,
- 02 in sheltered housing,
- 03 at another person's home,
- 04 in hospital,
- 05 in a hospice,
- 06 in a nursing home,
- 07 in a care home,
- 08 in a mixed nursing /residential home,
- 09 in an ambulance/en route to hospital/en route to hospice etc?
- 95 Other (Please specify)

*IF place of death was other [EiPlac = 95 Other]*

| | **EIPLACOT @**  
| (What was this other place?)  
| INTERVIEWER: Write in.  
| STRING 100

ELSE

| *IF died in another person's home [EiPlac = 3]*

| | **EIPLACOH**  
| | In whose home did [^deceased ELSA respondent's name] die?  
| | 1 Relative  
| | 2 Non-relative  
| |  
| | END FILTER

END FILTER

*IF did not die at home [EiPlac = 2..9 or 95]]*

| | **EIPLCN**  
| | On how many different occasions did [[^deceased ELSA respondent's name] stay in [place] in the last two years before [^he/she] died?  
| | INTERVIEWER: If appropriate include more than one person's home INTERVIEWER: Specify the number  
| | of times.  
| | Range: 1..95

| | **EIPLCL**  
| | In total, how long did [^deceased ELSA respondent's name] stay in [^place from EiPlac] in the last two years before [^he/she] died?  
| | INTERVIEWER: If stayed on more than one occasion add the times together.  
| | 1 One day or more, but less than one week  
| | 2 One week or more but less than one month  
| | 3 One month or more but less than 3 months  
| | 4 3 months or more but less than 6 months  
| | 5 6 months or more but less than a year  
| | 6 A year or more  
| | 7 Don't know

|  
END FILTER

**EILIVINT**

I would now like to ask you some questions about where [^deceased ELSA respondent's name] lived or stayed overnight as a result of [^his/her] health in the two years before [^he/she] died.

1 Continue

**EILIVE**

***[Multiple responses to EILIVE are recorded in variables EILIVE1 to EILIVE9]***

SHOW CARD EI3

How many other types of places did [^deceased ELSA respondent's name] stay in overnight during the two years before [^he/she] died, because of [^his/her] health?

INTERVIEWER: Include NHS and privately-owned establishments CODE ALL THAT APPLY.

01 At home

02 In sheltered housing

03 Other person's home

04 In hospital

05 In a hospice

06 In a nursing home

07 In a residential home

08 In a mixed nursing /residential home

91 Not known whether residential or care home

95 Other place (Specify at next question)

96 Stayed at no other places

(In addition there are backcoded categories from other answers: 9 = hotel/ B and B, 91= unknown whether nursing or care home)

*If lived or stayed in another person's home [EILive =3]*

|  
**EIHOMESTY**

| In whose home did [^deceased ELSA respondent's name] stay?

| 1 Relative

| 2 Non-relative

|  
**EILOTHA**

| On how many different occasions did [^deceased ELSA respondent's name] stay in another person's home in the last two years before [^he/she] died?

| INTERVIEWER: Enter the number of times.

| Range: 1..95

|  
**EILOTHB**

| In total, how long did [^deceased ELSA respondent's name] stay in another person's home in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

| 1 One day or more, but less than one week

| 2 One week or more but less than one month

| 3 One month or more but less than 3 months

| 4 3 months or more but less than 6 months

| 5 6 months or more but less than a year

| 6 A year or more

| 7 Don't know

|  
END FILTER

*If lived or stayed in hospital [EiLive=4]*

|  
**EILHOSPA**

| On how many different occasions did [^deceased ELSA respondent's name] stay in a hospital in the last two years before [^e/she] died?

| INTERVIEWER: Enter the number of times.

| Range: 1..95

|  
**EILHOSPB**

| In total, how long did [^deceased ELSA respondent's name] stay in a hospital in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

- | 1 One day or more, but less than one week
- | 2 One week or more but less than one month
- | 3 One month or more but less than 3 months
- | 4 3 months or more but less than 6 months
- | 5 6 months or more but less than a year
- | 6 A year or more
- | 7 Don't know

|  
END FILTER

*If lived or stayed in hospice [EiLive=5]*

|  
**EILHPCEA**

| On how many different occasions did [^deceased ELSA respondent's name] stay in a hospice in the last two years before [^he/she] died?

| INTERVIEWER: Enter the number of times.

| Range: 1..95

|  
**EILHPCEB**

| In total, how long did [^deceased ELSA respondent's name] stay in a hospice in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

- | 1 One day or more, but less than one week
- | 2 One week or more but less than one month
- | 3 One month or more but less than 3 months
- | 4 3 months or more but less than 6 months
- | 5 6 months or more but less than a year
- | 6 A year or more
- | 7 Don't know

|  
END FILTER

*IF lived or stayed in a nursing home [EiLive=6]*

**EILNURSA**

On how many different occasions did [^deceased ELSA respondent's name] stay in a nursing home in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

**EILNURSB**

In total, how long did [^deceased ELSA respondent's name] stay in a nursing home in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

END FILTER

*IF lived or stayed in a care home [EiLive=7]*

**EILRESA**

On how many different occasions did [^deceased ELSA respondent's name] stay in a residential home in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

**EILRESB**

In total, how long did [^deceased ELSA respondent's name] stay in a residential home in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

END FILTER

*IF lived or stayed in a mixed nursing and care home [EiLive=8]*

**EILMIXA**

On how many different occasions did [^deceased ELSA respondent's name] stay in mixed nursing/residential home in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

| **EILMIXB**

| In total, how long did [^deceased ELSA respondent's name] stay in mixed nursing/residential home in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

- | 1 Less than 24 hours
- | 2 One day or more, but less than one week
- | 3 One week or more but less than one month
- | 4 One month or more but less than 3 months
- | 5 3 months or more but less than 6 months
- | 6 6 months or more but less than a year
- | 7 A year or more
- | 8 Don't know

| END FILTER

| *IF lived or stayed in sheltered housing [EiLive=2]*

| **EILSHELA**

| On how many different occasions did [^deceased ELSA respondent's name] stay in sheltered housing in the last two years before [^he/she] died?

| INTERVIEWER: Enter the number of times.

| Range: 1..95

| **EILSHELB**

| In total, how long did [^deceased ELSA respondent's name] stay in sheltered housing in the last two years before [^he/she] died?

| INTERVIEWER: If stayed on more than one occasion add the times together.

- | 1 One day or more, but less than one week
- | 2 One week or more but less than one month
- | 3 One month or more but less than 3 months
- | 4 3 months or more but less than 6 months
- | 5 6 months or more but less than a year
- | 6 A year or more
- | 7 Don't know

| END FILTER

| *IF lived or stayed in other place EiLive=95 (other)*

| **EILIVEA**

| How many other types of places did [^he/she] stay in during the two years before [^he/she] died?

| INTERVIEWER: If more than one other place, record each place at a separate question.

| Range: 1..5

| *IF How many other types of place = RESPONSE [EiLIVEa = RESPONSE]*

| LOOP FOR idx:= 1 TO EiLIVEa

| | **EILIVEB @**

| | **[Loop: Responses to EILIVEB are recorded in variables EILIVE1 to EILIVE5]**

| | (What was this other place)?

| | INTERVIEWER: Write in the other place.

| | STRING 100

**EILEXTA**

**[Loop: Responses to EILEXTA are recorded in variables EILEXT1 to EILEXT5]**

On how many different occasions did [^deceased ELSA respondent's name] stay in this place in the last two years before [^he/she] died?

INTERVIEWER: Enter the number of times.

Range: 1..95

**EILEXTB**

**[Loop: Responses to EILEXTB are recorded in variables EILEXT1 to EILEXT5]**

In total, how long did [^deceased ELSA respondent's name] stay in this place in the last two years before [^he/she] died?

INTERVIEWER: If stayed on more than one occasion add the times together.

- 1 One day or more, but less than one week
- 2 One week or more but less than one month
- 3 One month or more but less than 3 months
- 4 3 months or more but less than 6 months
- 5 6 months or more but less than a year
- 6 A year or more
- 7 Don't know

END FILTER

END FILTER

END FILTER

## **Activities and help**

**EIDISTPH**

SHOW CARD EI4

We'd like to ask you about [^deceased ELSA respondent's name]'s physical health and activity. During [^his/her]

last year, which of these descriptions fits [^his/her] experience best?

- 1 [^He/She] was active and disability free, and died suddenly
- 2 [^He/She] was mostly active and disability free, but declined during the last few months before [^he/she] died
- 3 [^He/She] had times of being seriously disabled, mixed with times of being active
- 4 [^He/She] gradually become more and more disabled, without times of being active
- 5 None of these
- 6 Don't know

**EIADLINT @**

I would now like to ask you about problems [^deceased ELSA respondent's name] might have had in [^his/her] everyday life, before [^he/she] died. The next questions are about help [^he/she] may have received. Please tell me if [^he/she] had received any help because of a physical, mental, emotional or memory problem during the last three months of [^his/her] life.

INTERVIEWER: Press and to continue.

Range: 1..1

**EIADLA**

During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...

INTERVIEWER: READ OUT ... dressing, including putting on shoes and socks?

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

**EIADLB**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... walking across a room?

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

**EIADLC**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... bathing or showering?

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

**EIADLD**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... eating such as cutting up [^his/her] food?

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

**EIADLE**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... getting in or out of bed?

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

**EIADLF**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... using the toilet, including getting up and down?

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

**EIADLG**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... preparing hot meals?

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

**EIADLH**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... shopping for groceries?

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

**EIADLI**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... making telephone calls?

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

**EIADLJ**

(During the last three months of [^his/her] life, did [^deceased ELSA respondent's name] need help with ...)

INTERVIEWER: READ OUT ... taking medication?

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

*If needed help with dressing in last three months of life [EiADLA = Yes]*

|

| **EIADLA2**

| In total, for how long had [^he/she] needed help with dressing when [^he/she] died?

| @/@/READ OUT...

- | 1 one month or less
- | 2 more than one month, but less than one year
- | 3 between one and two years
- | 4 or, over two years?
- | 96 Don't know

|

| *If needed help with dressing for one month or less [EiADLA2 = 1]*

| | **EiADLA2W**

| | In total, how many weeks was this?

| | Range : 1..4

| | ELSE

|

| *If needed help with dressing for more than one month to two years [EiADLA2 =2 or3]*

| | **EiADLA2M**

| | In total, how many months was this?

| | Range : 2..24

ELSE

*If needed help with dressing for more than two years [EIADLA2 =4]*

**EIADLA2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*If needed help with walking in last three months of life [EiADLB= Yes]*

**EIADLB2**

For how long had [^he/she] needed help with walking, when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with walking for one month or less [EIADLB2 = 1]*

**EiADLB2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with walking for more than one month to two years [EIADLB2 =2 or3]*

**EIADLB2M**

In total, how many months was this?

Range : 2..24

ELSE

*If needed help with walking for more than two years [EIADLB2 =4]*

**EIADLB2Y**

In total, how many years was this?

Range : 3..97

ND FILTER

END FILTER

ELSE

*If did not need help with walking in last three months of life [EiADLB= No]*

**EIADLB3**

During the last three months of [^his/her] life, was [^deceased ELSA respondent's name] able to walk 100 yards by [^him/herself] and without using any special equipment? Did [^he/she] have ...READ OUT...

1 ...no difficulty,

2 some difficulty,

3 much difficulty,

4 was unable to do this?

5 Don't know

*If had no difficulty walking 100 yards by him/herself [EiADLB3 = 1]*

**EIADLB4**

During the last three months of [^his/her] life, was [^deceased ELSA respondent's name] able to walk for a quarter of a mile by [^him/herself] and without using any special equipment? Did [^he/she] have ...READ OUT...

- 1 ...no difficulty,
- 2 some difficulty,
- 3 much difficulty,
- 4 was unable to do this?
- 5 Don't know

END FILTER

END FILTER

END FILTER

*If needed help with bathing or showering in last three months of life [EiADLC= Yes]*

**EIADLC2**

In total, for how long had [^he/she] needed help with bathing or showering, when [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?
- 96 Don't know

*If needed help with bathing or showering for one month or less [EiADLC2 = 1]*

**EiADLC2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with bathing or showering for more than one month to two years [EiADLC2 =2 or3]*

**EiADLC2M**

In total, how many months was this?

Range : 2..24

ELSE

*If needed help with bathing or showering for more than two years [EiADLC2 =4]*

**EiADLC2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*If needed help with eating in last three months of life [EiADLD= Yes]*

**EIADLD2**

In total, for how long had [^he/she] needed help with eating when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with eating for one month or less [EIADLD2 = 1]*

**EiADLD2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with eating for more than one month to two years [EIADLD2 =2 or3]*

**EIADLD2M**

In total, how many months was this?

Range : 2..24

ELSE

*If needed help with eating for more than two years [EIADLD2 =4]*

**EIADLD2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

ELSE

*IF needed help with getting in or out of bed in last three months of life [EiADLE= Yes]*

**EiADLE2**

In total, for how long had [^he/she] needed help getting in or out of bed, when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with getting in or out of bed for one month or less [EIADLE2 = 1]*

**EiADLE2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with getting in or out of bed for more than one month to two years [EIADLE2 =2 or3]*

**EiADLE2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with getting in or out of bed for more than two years [EIADLE2 =4]*

| | **EIADLE2Y**  
| | In total, how many years was this?  
| | Range : 3..97  
| | END FILTER  
| | END FILTER

*IF needed help with using the toilet in last three months of life [EiADLF= Yes]*

| | **EIADLF2**  
| | In total, for how long had [^he/she] needed help with using the toilet, when [^he/she] died?  
| | @/@/READ OUT...  
| | 1 one month or less  
| | 2 more than one month, but less than one year  
| | 3 between one and two years  
| | 4 or, over two years?  
| | 96 Don't know

*If needed help with using the toilet for one month or less [EIADLF2 = 1]*

| | **EiADLF2W**  
| | In total, how many weeks was this?  
| | Range : 1..4  
| | ELSE

*If needed help with using the toilet for more than one month to two years [EIADLF2 =2 or3]*

| | **EIADLF2M**  
| | In total, how many months was this?  
| | Range: 2..24  
| | ELSE

*If needed help with using the toilet for more than two years [EIADLF2 =4]*

| | **EIADLF2Y**  
| | In total, how many years was this?  
| | Range : 3..97  
| | END FILTER  
| | END FILTER

*IF needed help with preparing hot meals in last three months of life [EiADLG= Yes]*

| | **EIADLG1**  
| | (You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received help to prepare hot meals.) Was that because of a health or memory problem?  
| | INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either  
| | their health or memory.  
| | 1 Yes  
| | 2 No  
| | 3 Don't know

**EIADLG2**

In total, for how long had [^he/she] needed help with preparing hot meals, when [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?
- 96 Don't know

*If needed help with preparing hot meals for one month or less [EIADLG2 = 1]*

**EiADLG2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with preparing hot meals for more than one month to two years [EIADLG2 =2 or3]*

**EIADLG2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with preparing hot meals for more than two years [EIADLG2 =4]*

**EIADLG2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*IF needed help with shopping for groceries in last three months of life [EiADLH= Yes]*

**EIADLH1**

(You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received help with shopping for groceries.) Was that because of a health or memory problem?

INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either

their health or memory.

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

**EIADLH2**

In total, for how long had [^he/she] needed help with shopping for groceries, when [^he/she] died?

@/@/READ OUT...

- 1 one month or less
- 2 more than one month, but less than one year
- 3 between one and two years
- 4 or, over two years?
- 96 Don't know

*If needed help with shopping for groceries for one month or less [EIADLH2 = 1]*

**EiADLH2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with shopping for groceries for more than one month to two years [EIADLH2 =2 or3]*

**EIADLH2M**

In total, how many months was this?

Range: 2..24

ELSE

*If needed help with shopping for groceries for more than two years [EIADLH2 =4]*

**EIADLH2Y**

In total, how many years was this?

Range : 3..97

END FILTER

END FILTER

*IF needed help with making telephone calls in last three months of life [EiADLI= Yes]*

**EIADLI1**

(You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received help to make phone calls.) Was that because of a health or memory problem?

INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either

their health or memory.

1 Yes

2 No

3 Don't know

**EIADLI2**

In total, for how long had [^he/she] needed help making telephone calls, when [^he/she] died?

@/@/READ OUT...

1 one month or less

2 more than one month, but less than one year

3 between one and two years

4 or, over two years?

96 Don't know

*If needed help with making telephone calls for one month or less [EIADLI2 = 1]*

**EiADLI2W**

In total, how many weeks was this?

Range : 1..4

ELSE

*If needed help with making telephone calls for more than one month to two years [EIADLI2 =2 or3]*

**EIADLI2M**

In total, how many months was this?

Range: 2..24

ELSE

| *If needed help with making telephone calls for more than two years [EIADLI2 =4]*

| **EIADLI2Y**

| | In total, how many years was this?

| | Range : 3..97

| | END FILTER

| END FILTER

| *IF needed help with taking medication in last three months of life [EiADLJ= Yes]*

| **EIADLJ1**

| (You said earlier that during the last three months of [^his/her] life [^deceased ELSA respondent's name] received

| help with taking medication.) Was that because of a health or memory problem?

| INTERVIEWER: If the respondent gives an actual reason, decide whether this was a problem with either

| their health or memory.

| 1 Yes

| 2 No

| 3 Don't know

| **EIADLJ2**

| In total, for how long when [^he/she] died had [^he/she] needed help when taking medication?

| @/@/READ OUT...

| 1 one month or less

| 2 more than one month, but less than one year

| 3 between one and two years

| 4 or, over two years?

| 96 Don't know

| *If needed help with taking medication for one month or less [EIADLJ2 = 1]*

| **EiADLJ2W**

| | In total, how many weeks was this?

| | Range : 1..4

| | ELSE

| *If needed help with taking medication for more than one month to two years [EIADLJ2 =2 or3]*

| **EIADLJ2M**

| | In total, how many months was this?

| | Range: 2..24

| | ELSE

| *If needed help with taking medication for more than two years [EIADLJ2 =4]*

| **EIADLJ2Y**

| | In total, how many years was this?

| | Range : 3..97

| | END FILTER

| END FILTER

**EIADLK**

Were there any other activities that [^deceased ELSA respondent's name] had problems with in the last 3 months of [^his/her] life?

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

*IF there were any other difficulties with activities [EiADLK = Yes]*

| **EIADLKO** @ (but back coded other answers are available in EiADLKZ1..10 based on answers to EIADLKO)

| What other activities did they have problems with?

| STRING 50

| **EIADLK2**

| Did anyone help [^him/her] with these activities?

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

END FILTER

**EIHCNT**

Computed: number of ADLS deceased ELSA respondent had problems with [computed from answers to EiALDA...K]

*IF needed help with at least one ADL 1 [EiHCnt >= 1]*

| **EIWHL P** (NB the categories in this question are different from W4 and W6)

| *[Multiple responses to EIWHL P are recorded in variables EIWHL P01S to EIWHL P17 at wave 3]*

| SHOW CARD EI5

| Thinking about the [^activity from EiADLA..K] that [^deceased ELSA respondent's name] had problems with, who usually helped [^deceased ELSA respondent's name] with [^this\these activity\ies]?

PROBE: [^deceased ELSA respondent's name] with [^this\these activity\ies]?

CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- |01 Respondent (you)
- |02 Husband or wife or partner
- |03 Mother or father
- |04 Son
- |05 Son-in-law
- |06 Daughter
- |07 Daughter-in-law
- |08 Sister
- |09 Brother
- |10 Grandson
- |11 Granddaughter
- |12 Other relative
- |13 Unpaid volunteer
- |14 Privately paid employee
- |15 Social or health service worker
- |16 Friend or neighbour
- |17 Other person

END FILTER

## Cognitive ability

### **EICOGINT @**

Now I would like to ask you some questions about [^deceased ELSA respondent's name]'s memory and concentration during [^his/her] last year of life.

1 Continue

### **EICOGA**

Did [^deceased ELSA respondent's name] have difficulty remembering things about [^his/her] family and friends, like occupations, birthdays or addresses? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGB**

Did [^he/she] have difficulty remembering things that had happened recently? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGC**

Did [^he/she] have difficulty recalling conversations a few days after they had taken place? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGD**

Did [^he/she] have difficulty remembering [^his/her] address and telephone number? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

### **EICOGE**

Did [^he/she] have difficulty remembering what day and month it was? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

**EICOGF**

Did [^deceased ELSA respondent's name] have difficulty remembering where things were usually kept? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

**EICOGG**

Did [^he/she] have difficulty following a story in a book, on the radio or on the TV? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

**EICOGH**

Did [^he/she] have difficulty making decisions on everyday matters? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

**EICOGI**

Did [^he/she] have difficulty handling financial matters, like [^his/her] pension or dealing with the bank? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

**EICOGJ**

Did [^he/she] ever forget what had been said and repeat the same question again and again? IF YES, PROBE: Did [^he/she] do this occasionally or frequently?

- 1 No
- 2 Occasionally
- 3 Frequently
- 4 Don't know

**EICOGK**

Did [^deceased ELSA respondent's name] have difficulty in interpreting surroundings, such as knowing where [^he/she] was, or distinguishing between different types of people, such as doctors, visitors and relatives? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 or, great difficulty?
- 4 SPONTANEOUS: Don't know

**EICOGI**

Did [^he/she] have difficulty finding the way about [^the/ his/her home] or finding the toilet? Did he have ... READ OUT ...

- 1 ...no difficulty,
- 2 slight difficulty,
- 3 great difficulty,
- 4 Not applicable
- 5 Don't know

**EICOGM**

When speaking, did [^he/she] sometimes have difficulty finding the right word, or sometimes use the wrong words? IF YES, PROBE: Did [^he/she] do this occasionally or frequently?

- 1 No
- 2 Yes, occasionally
- 3 Yes, frequently
- 4 Don't know

**EICOGN**

Did [^deceased ELSA respondent's name] sometimes repeat the same word or phrase over and over again?

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

**EICOGO**

Did [^his/her] thinking seem muddled at times?

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

*IF had any of the cognitive difficulties at EiCogJ, EiCogK, EiCogL, EiCogM, EiCogN, EiCogO,*

*[NOT (((((EiCogJ = No) AND (EiCogK = No)) AND (EiCogL = No)) AND (EiCogM = No)) AND (EiCogN = No)) AND (EiCogO = No)) AND NOT (((((EiCogJ = NONRESPONSE AND EiCogK = NONRESPONSE) AND EiCogL = NONRESPONSE) AND EiCogM = NONRESPONSE) AND EiCogN = NONRESPONSE) AND EiCogO = NONRESPONSE)]*

|

**EICOGP**

| How long were these changes or difficulties with memory and concentration present?

| PROBE: From about how long before [^he/she] died?

| @/@/READ OUT...

- | 1 one month or less
- | 2 more than one month, but less than one year
- | 3 between one and two years
- | 4 or, over two years?
- | 96 Don't know

| *If these changes or difficulty were present for one month or less [EICOGP= 1]*

| **EiCOGPW**

| In total, how many weeks was this?

| Range : 1..4

| ELSE

| *If these changes or difficulty were present for more than one month to two years [EICOGP =2 or3]*

| **EiCOGPM**

| In total, how many months was this?

| Range: 2..24

| ELSE

| *If changes or difficulty were present for more than two years [EICOGP =4]*

| **EiCOGPY**

| In total, how many years was this?

| Range : 3..97

| END FILTER

| END FILTER

| **EICOQQ**

| Did these changes or difficulties develop gradually or did they come on suddenly?

| 1 Gradually

| 2 Suddenly

| 3 Don't know

| END FILTER

| **EICOGR**

| Were there marked fluctuations in [^his/her] level of attention or alertness?

| 1 No

| 2 Yes

| 3 Don't know

| *IF there were marked fluctuations in attention or alertness[EiCogR = Yes]*

| **EICOGS**

| How long were these fluctuations in [^his/her] levels of attention or alertness present?

| PROBE: From about how long before [^he/she] died?

| @/@/READ OUT...

| 1 one month or less

| 2 more than one month, but less than one year

| 3 between one and two years

| 4 or, over two years?

| 96 Don't know

| *If these fluctuations were present for one month or less [EICOGS= 1]*

| **EICOGSW**

| In total, how many weeks was this?

| Range : 1..4

| ELSE

| *If these fluctuations were present for more than one month to two years [EICOGS =2 or3]*

| **EICOGSM**

| | In total, how many months was this?

| | Range: 2..24

| | ELSE

| *If fluctuations were present for more than two years [EICOGS =4]*

| **EICOGSY**

| | In total, how many years was this?

| | Range : 3..97

| | END FILTER

| END FILTER

END FILTER

## ***Problem behaviour***

### **EITIMEIN @**

Now I'm going to describe some difficult behaviors, which only a minority of people experience, and which can make caring for them more of a challenge. I would like you to tell me how frequently, if at all [^deceased ELSA respondent's name] engaged in these behaviors during [^his/her] last year of life. We would like to know if [^deceased ELSA respondent's name] engaged in the behavior often, sometimes, rarely, or never.

INTERVIEWER: Press and to continue.

Range: 1..1

### **EIPBHA**

SHOW CARD EI6

During [^his/her] last year of life, how often did [^deceased ELSA respondent's name] have temper tantrums? Was it often, sometimes, rarely, or never?

1 Often

2 Sometimes

3 Rarely

4 Never

5 Don't know

### **EIPBHB**

SHOW CARD EI6

And did [^deceased ELSA respondent's name] make violent threats or attempts? How often did [^he/she] do this?

1 Often

2 Sometimes

3 Rarely

4 Never

5 Don't know

### **EIPBHC**

SHOW CARD EI6

How often did [^deceased ELSA respondent's name] break things on purpose?

1 Often

2 Sometimes

3 Rarely

4 Never

5 Don't know

**EIPBHD**

SHOW CARD EI6

How often did [^deceased ELSA respondent's name] cause complaints from the community?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Not applicable
- 6 Don't know

**EIPBHE**

SHOW CARD EI6

During [^his/her] last year of life, how often did [^deceased ELSA respondent's name] engage in strange or peculiar behaviour?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

**EIPBHF**

SHOW CARD EI6

And how often did [^deceased ELSA respondent's name]'s behaviour cause complaints from family members?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

***Mental health*****EIMHFINT @**

I would now like to ask you a few questions about [^deceased ELSA respondent's name]'s mood during the last year of [^his/her] life.

- 1 Continue

**EIMHFA**

Did [^he/she] seem to lose interest or enjoyment in most things, during [^his/her] last year of life?

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

**EIMHFB**

Do you think that [^he/she] was inclined to blame [^him/herself] or feel unreasonably guilty about things during [^his/her] last year of life?

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

**EIMHFC**

Do you think [^he/she] was depressed during [^his/her] last year of life? IF YES, PROBE:

Was [^he/she] depressed sometimes or frequently?

- 1 No
- 2 Yes, sometimes
- 3 Yes, frequently
- 4 Don't know

*IF lost interest or enjoyment in things, felt guilty or was depressed [(EiMHFA = Yes) OR (EiMHFB = Yes) OR (EiMHFC =2 or 3)]*

|

**EIMHFD**

| Do you think there was a reason for [^him/her] to [^lose interest or enjoyment in things/ feel guilty about things/ feel depressed about things] during this time?

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

|

**EIMHFE**

| Did [^he/she] feel so bad that it affected every part of [^his/her] life, (like [^his/her] work, friendship and family life) during [^his/her] last year of life?

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

|

**EIMHFF**

| How long had [^he/she] felt like this, when [^he/she] died?

| INTERVIEWER: Code how the answer is given.

| @/@/READ OUT...

- | 1 one month or less
- | 2 more than one month, but less than one year
- | 3 between one and two years
- | 4 or, over two years?
- | 96 Don't know

| *If felt like this for one month or less [EIMHFF= 1]*

**EIMHFFW**

| In total, how many weeks was this?

- | Range : 1..4
- | ELSE

|

| *If felt like this for more than one month to two years [EIMHFF =2 or3]*

**EIMHFFM**

| In total, how many months was this?

- | Range: 2..24
- | ELSE

|

| *If felt like this for more than two years [EIMHFF =4]*

| | **EIMHFFY**

| | In total, how many years was this?

| | Range : 3..97

| | END FILTER

| END FILTER

**EIMHFG**

SHOW CARD EI6

How often do you think [^deceased ELSA respondent's name] felt happy during [^his/her] last year of life?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

**EIMHFH**

SHOW CARD EI6

How often do you think [^deceased ELSA respondent's name] felt contented or at peace during [^his/her] last year of life?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

**EIMHFI**

SHOW CARD EI6

And how about the last three months of [^his/her] life, how often do you think [^deceased ELSA respondent's name] felt contented or at peace during this time?

- 1 Often
- 2 Sometimes
- 3 Rarely
- 4 Never
- 5 Don't know

## ***Sight and hearing***

### **EIHRINT @**

The next questions are about problems [^deceased ELSA respondent's name] may have had with [^his/her] eyesight or hearing, during the last 3 months of [^his/her] life.

1 Continue

### **EIEYE**

Was [^deceased ELSA respondent's name]'s eyesight (using glasses or corrective lens as usual)...READ OUT...

1 excellent,

2 very good,

3 fair,

4 or, poor?

5 SPONTANEOUS: Registered or legally blind

### **EIOPT**

***[Multiple responses to EIOPT are recorded in variables EIOPT1 to EIOPT4, EIOPT96 ]***

Did a doctor ever tell [^deceased ELSA respondent's name] that [^he/she] had any of these conditions?

INTERVIEWER: Read out each in turn and code all that apply. Include diabetic retinopathy in code 2.

Include age related maculopathy in code 3.

1 Glaucoma or suspected glaucoma

2 Diabetic eye disease

3 Macular degeneration

4 Cataracts

96 None of these

*IF doctor ever told deceased they had cataracts [EiOpt=4]*

|

### **EICAT**

| Did [^deceased ELSA respondent's name] ever have cataract surgery?

| 1 Yes

| 2 No

| 3 Don't know

|

END FILTER

### **EIHEAR**

Was [^deceased ELSA respondent's name]'s hearing (using a hearing aid as usual)...READ OUT...

1 excellent

2 very good

3 fair

4 or, poor?

## **Cardiovascular conditions**

### **EICAINT @**

I would now like to ask you a few questions about other conditions that [^deceased ELSA respondent's name] may have suffered from.

1 Continue

*IF Heart Attack was the main cause of death [QScenario.EiCaus = 2]*

### **EICAHA**

You told me earlier that [^deceased ELSA respondent's name] died following a heart attack. Did a doctor ever tell [^him/her] that [^he/she] had had a heart attack, before the one that led to [^his/her] death?

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

ELSE

*IF Stroke was the main cause of death [QScenario.EiCaus = 3]*

### **EICAST**

You told me earlier that [^deceased ELSA respondent's name] died following a stroke. Did a doctor ever tell [^him/her] that [^he/she] had had a stroke, before the one that led to [^his/her] death?

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

END FILTER

END FILTER

### **EIDIAA**

**[Multiple responses to EIDIAA are recorded in variables EIDIAA1 to EIDIAA9]**

SHOW CARD E17

[^ And apart from this did\ Did] a doctor ever tell [^him/her] that [^he/she] had any [^other] of the conditions on this

card? PROBE : What others? CODE ALL THAT APPLY.

01 High blood pressure or hypertension

02 Angina

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

04 Congestive heart failure

05 A heart murmur

06 An abnormal heart rhythm

07 Diabetes or high blood sugar

08 A stroke (cerebral vascular disease)

09 High cholesterol

95 Any other heart trouble (SPECIFY)

96 None of these

*IF doctor ever told deceased he/she had other condition [EiDiaA= 95 (other)]*

**EIDIX @**

| INTERVIEWER: Enter the name of the other heart condition.  
| STRING 50

| END FILTER

| *IF doctor ever told deceased he/she had high blood pressure or hypertension [ EiDiaA=1]*

| **EIBPST**

| Did [^deceased ELSA respondent's name] have high blood pressure during the last 12 months of  
|^his/her] life?

- | 1 Yes
- | 2 No

| **EIMDA**

| Was [^deceased ELSA respondent's name] taking any medicines, tablets or pills for high blood  
| pressure during the last 12 months of [^his/her] life?

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

| END FILTER

| *IF doctor ever told deceased he/she had angina [ EiDiaA=2]*

| **EIAGA**

| Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a  
| doctor that [^he/she] had angina?

| INTERVIEWER: Enter the age in years.  
| Range: 0..110

| **EIYR1**

| Did [^deceased ELSA respondent's name] have angina during the last 12 months of [^his/her] life?

- | 1 Yes
- | 2 No
- | | END

| *IF doctor ever told deceased he/she had angina or heart attack [EiDiaA=2 OR EiDiaA=2]*

| **EiHMed**

| Was [^deceased ELSA respondent's name] taking any taking any medication to thin the blood  
| such as Warfarin, Plavix, Ticlid, or other blood-thinning medication during the last 12 months of  
| [^his/her] life?

- | 1 Yes
- | 2 No

| END FILTER

*If deceased was told by the doctor they had had a heart attack  
[(EiDiaA=3) OR (EiCaHa = Yes)]*

**EIAGB**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had had a heart attack (including myocardial infarction or coronary thrombosis)?

INTERVIEWER: Enter the age in years.

Range: 0..110

ELSE

*IF cause of death was not heartattack [QScenario..EiCaus~=2]. If iEiCaus=1 then EIYR2=1  
automatically.*

**EIYR2 (In Waves 4 and 6 this question was replaced by a question about number of heart attacks - EINMMI)**

Did [EiName1] have a heart attack or myocardial infarction during the last 12 months of [hisher] life?

1 Yes

2 No

END FILTER

END FILTER

*If deceased was told by the doctor they had congestive heart failure [ EiDiaA=4]*

**EIAGC**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had congestive heart failure?

INTERVIEWER: Enter the age in years.

Range: 0..110

END FILTER

*If deceased was told by the doctor they had a heart murmur [ EiDiaA=5]*

**EIAGK**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had a heart murmur?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIAGK2**

Did [^deceased ELSA respondent's name] have a heart murmur during the last 12 months of [^his/her] life?

1 Yes

2 No

END FILTER

*If deceased was told by the doctor they had an abnormal heart rhythm [ EiDiaA=6]*

**EIAGL**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had an abnormal heart rhythm?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIAGL2**

Did [^deceased ELSA respondent's name] have an abnormal heart rhythm during the last 12 months of [^his/her] life?

1 Yes

2 No

END FILTER

*If deceased was told by the doctor they had diabetes or high blood sugar [ EiDiaA=7]*

**EIAGD**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had diabetes or high blood sugar?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EIAGDI**

Did [^deceased ELSA respondent's name] inject insulin for diabetes during the last 12 months of [^his/her] life?

1 Yes

2 No

**EIMDB**

Did [^deceased ELSA respondent's name] take any tablets, pills or other medicines for diabetes during the last 12 months of [^his/her] life?

1 Yes

2 No

END FILTER

*If deceased was told by the doctor they had had a stroke [( EiDiaA=8) OR (EiCaSt = Yes)]*

**EIAGM**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had had a stroke?

INTERVIEWER: Enter the age in years.

Range: 0..110

ELSE

**|| EIAGM2 (NB in Wave 4 and Wave 6 there was a new question EINMST about number of strokes instead of this question**

**||**

|| Did [^deceased ELSA respondent's name] have a stroke in the last 12 months of [^his/her] life?

|| 1 Yes

|| 2 No

| |

| END FILTER

END FILTER

*If deceased was told by the doctor they had high cholesterol [EiDiaA=9]*

**| EiCYR**

| Did [^deceased ELSA respondent's name] have high cholesterol during the last 12 months [^his/her] life?"

| 1 Yes

| 2 No

| |

**| EiMDC**

| Was [^deceased ELSA respondent's name] taking medication to lower [^his/her] cholesterol level during the last 12 months of [^his/her] life?"

| 1 Yes

| 2 No

END FILTER

*If deceased was told by the doctor they had other condition [EiDiaA=95 (other)]*

| |

**| EIAGN**

| Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had [^name of other condition from EiDix]?

| INTERVIEWER: Enter the age in years.

| Range: 0..110

| |

**| EIAGN2**

| Did [^deceased ELSA respondent's name] have [^name of other condition from EiDix] during the last 12 months of [^his/her] life?

| 1 Yes

| 2 No

| |

END FILTER

## **Chronic conditions**

*If Cancer was the main cause of death [QScenario.EiCaus = 1]*

| |

**| EICACA**

| You told me earlier that [^deceased ELSA respondent's name] died of cancer. Did a doctor ever tell [^him/her] that [^he/she] had cancer?

| 1 Yes

| 2 No

| 3 Don't know

| |

END FILTER

**EIDIAB (note that category 10 in Waves 4 and 6 was not included at Wave 3)**

**[Multiple responses to EIDIAB are recorded in variables EIDIAB1 to EIDIAB10, EIDIAB96]**

SHOW CARD E18

[^ And apart from this do\ Do] you know if [^deceased ELSA respondent's name] was ever told by a doctor that [^he/she] had any [^other] of the conditions on this card?

INTERVIEWER PROBE - 'What others?'...CODE ALL THAT APPLY. [Add1]

01 Chronic lung disease such as chronic bronchitis or emphysema

02 Asthma

03 Arthritis (including osteoarthritis , or rheumatism)

04 Osteoporosis, sometimes called thin or brittle bones

05 Cancer or a malignant tumour (excluding minor skin cancers)

06 Parkinson's disease

07 Any emotional, nervous or psychiatric problems

08 Alzheimer's disease

09 Dementia, organic brain syndrome, senility or any other serious memory impairment

96 None of these

*IF deceased was told by the doctor they had Chronic lung disease [EiDiaB=1]*

|

| **EILNG**

| Was [^deceased ELSA respondent's name] taking medication or other treatment for [^his/her] lung condition during the last 12 months of [^his/her] life?

| 1 Yes

| 2 No

END FILTER

*IF deceased was told by the doctor they had Asthma [EiDiaB=2]*

|

| **EIAMA**

| Was [^deceased ELSA respondent's name] taking medication or other treatment for [^his/her] asthma during the last 12 months of [^his/her] life?

| 1 Yes

| 2 No

END FILTER

*IF deceased was told by the doctor they had Arthritis [EiDiaB=3]*

|

| **EIART**

| **[Multiple responses to EIART are recorded in variables EIART1 to EIART4]**

| Do you know which type or types of arthritis [^deceased ELSA respondent's name] had? Was it

...READ OUT...

| CODE ALL THAT APPLY.

| 1 Osteoarthritis?

| 2 Rheumatoid arthritis?

| 3 Some other kind of arthritis?

| 4 Don't know

|

| **EIAGF**

| Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had arthritis?

| INTERVIEWER: Enter the age in years.

| Range: 0..110

END FILTER

*IF deceased was told by the doctor they had Cancer [( EiDiaB=5) OR (EiCaCa = Yes)]*

**EIAGG**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had cancer or a malignant tumour?

INTERVIEWER: Enter the age in years.

Range: 0..110

**EICANA**

SHOW CARD EI9

In which organ or part of [^his/her] body did the cancer or tumour start? CODE ONE

ONLY

1 Lung

2 Breast

3 Colon, bowel or rectum

4 Lymphoma

5 Leukaemia

6 Melanoma or other skin cancer

95 Somewhere else

*IF cancer started somewhere else [EICANA= 95 (somewhere else)]*

**EiCanO @**

INTERVIEWER: Record where cancer or tumour started."

: STRING[100]

END FILTER

**EiCanM**

Had [^deceased ELSA respondent's name] received any treatment for [^his/her] cancer or malignant tumour in the last 12 months of [^his/her] life?"

1 Yes

2 No

*IF deceased was told by the doctor they had Parkinson's disease [EiDiaB=6]*

**EIPRK**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had Parkinson's disease?

INTERVIEWER: Enter the age in years.

Range: 0..110

END FILTER

*IF deceased was told by the doctor they had emotional, nervous or psychiatric problems [ EiDiaB=7]*

**EIAGH**

Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had emotional, nervous or psychiatric problems?

INTERVIEWER: Enter the age in years.

Range: 0..110

| **EIPSY**

| *[Multiple responses to EIPSY are recorded in variables EIPSY1 to EIPSY8, EIPSY95]*

| SHOW CARD EI10

| What type of emotional, nervous or psychiatric problems did [^he/she] have? PROBE:

| What others? CODE ALL THAT APPLY.

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

| ELSE

| | **EIYRC**

| | Did [^he/she] have these problems during the last 12 months of [^his/her] life?

- | | 1 Yes
- | | 2 No

| END FILTER|

END FILTER

*IF deceased was told by the doctor they had Alzheimer's disease [EiDiaB=8]*

| **EIAGI**

| Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had Alzheimer's Disease?

| INTERVIEWER: Enter the age in years.

| Range: 0..110

END FILTER

*IF deceased was told by the doctor they had dementia, senility or any other serious memory impairment [EiDiaB=9]*

| **EIAGJ**

| Approximately how old was [^deceased ELSA respondent's name] when [^he/she] was first told by a doctor that [^he/she] had dementia, senility or any other serious memory impairment?

| INTERVIEWER: Enter the age in years.

| Range: 0..110

END FILTER

*IF deceased was told by the doctor they a malignant blood disorder[EiDiaB=10]*

| **EILEUK and EIAGK were not asked in Waves 2 and 3**

END FILTER

**EIAGO**

Did [^he/she] have any other major illnesses in the year preceding [^his/her] death?

- 1 Yes (Please specify at next question)
- 2 No
- 3 Don't know

*IF Did have any other major il = Yes [EiAgo = Yes]*

|  
|  
|  
|  
|  
|  
|  
|  
|

**EIAGOA @**

INTERVIEWER: Write in any other major illnesses.  
STRING 100

END FILTER

**Joint replacement and resurfacing (Artificial implants)**

**EIMEDINT @** (Note that at Wave 4 and 6 the wording of these questions was changed to refer to joint replacement or resurfacing rather than artificial implants)

I would now like to ask you about any artificial implants [^deceased ELSA respondent's name] may have had.

- 1 Continue

**EIMEDA**

Did [^he/she] ever have an artificial joint, such as an artificial hip, knee or finger joint implanted??

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

*IF deceased ever had a joint replacement or resurfacing [EiMedA = Yes]*

|  
|  
|  
|  
|

**EIMEDN**

How many such joints did [^he/she] have implanted?  
Range: 1..10

|

*IF responded to question about number of joints [EiMedN = RESPONSE]*

|  
|

LOOP FOR Idx:= 1 TO EiMedN

|

**EIMEDB @**

*[Loop: Responses to EIMEDB are recorded in variables EIMEDBZ1 to EIMEDBZ3, EIMEDBZ9, EIMEDBZ10]*

Which was the [^first\second etc] joint [^he/she] had implanted?

STRING 50

|

**EIMEDC**

*[Loop: Responses to EIMEDC are recorded in variables EIMEDC01 to EIMEDC11]*

In what year was the [^ joint mentioned at EiMedB] implanted?

INTERVIEWER: Specify the year.

Range: 1900..2900

|

**EIMEDCA**

*[Loop: Responses to EIMEDCA are recorded in variables EIMEDC01 to EIMEDC9]*

Was the [^ joint mentioned at EiMedB] implanted during [^his/her] last | | year of life?

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

**EIMEDE** (this question was not included at waves 4 and 6)

Was the [^ joint mentioned at EiMedB] removed or replaced?

- 1 Yes, removed
- 2 Yes, replaced
- 3 Neither
- 4 Don't know

*If joint was removed or replaced [EIMEDE=1 or 2]*

**EIMEDEA**

Was the [^ joint mentioned at EiMedB] replaced or resurfaced during the last year of life?"

- 1 Yes, replaced
- 2 Yes, resurfaced
- 3 Neither
- 4 Don't know

END FILTER

END FILTER

END FILTER

END FILTER

## ***Financing medical care***

**EIEXPINT @**

I'd now like to ask you some questions about any expenses which [^deceased ELSA respondent's name] incurred as a result of the medical care [^he/she] received in the year before [^he/she] died. Before I do that, though, I'd like to assure you again that everything you have already told me and anything else you tell me will be kept completely confidential.

INTERVIEWER: Press and to continue.

Range: 1..1

**EIEXPS**

Did [^deceased ELSA respondent's name] receive any medical treatments other than on the NHS?

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

*IF deceased receive any medical treatment other than NHS [EiExpS = Yes]*

**EIPHI**

Were any of the costs of these medical treatments covered by private health insurance?

- 1 Yes, all of the cost
- 2 Yes, some of the cost
- 3 No, none of the cost

- 4 No costs
- 5 Don't know

*IF some or none of the costs covered by insurance [EiPHI=2 or 3]*

**EIFHLP**

Other than insurances did [^deceased ELSA respondent's name] receive any financial help to pay for any of these medical treatments?

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

*IF receive any financial help = Yes [EiFHlp = Yes]*

**EIFWHO**

***[Multiple responses to EIFWHO are recorded in variables EIFWHO1 to EIFWHO3]***

Who else did [^deceased ELSA respondent's name] receive financial help from? CODE ALL THAT APPLY.

- 1 Child
- 2 Other relative
- 95 Other (please specify at next question)
- 96 Don't know

*IF receive financial help from other [EiFWho=95 (other)]*

**EIFWHOA @**

INTERVIEWER: Record who [^deceased ELSA respondent's name] received financial help from.  
STRING 150

END FILTER

**EITOTL @@**

How much money in total did [^deceased ELSA respondent's name] receive from others to pay for these treatments?

INTERVIEWER: Enter amount to the nearest £.

Range: 0..9999997

*IF NONRESPONSE in How much money in total [EiTotl = NONRESPONSE]*

**EiTotlB**

Was it.....

BRACKETS (250, 1000, 5000, 10000)

[Bracket results are recorded in EiTotl, EiTou, EiToe, EiTor]

END FILTER

**EIFAMT @@**

How much did [^deceased ELSA respondent's name][^and you/his/her spouse or partner] pay for the treatment [^themselves/ yourselves]?

INTERVIEWER: Enter amount to the nearest £.

Range: 0..9999997

*IF NON-RESP{ONSE in How much paid for the treatment [EiFAmt = NONRESPONSE]*

**EiFAmtB**

Was it.....

BRACKETS (250, 1000, 5000, 10000)

[Bracket results are recorded in EiFAI, EiFAu, EiFAe, EiFAr]

*IF amount paid for treatment was [(EiFAmt > 0) OR (EiFAmtB.RESULT = 1)]*

**EIHPAY**

***[Multiple responses to EIHPAY are recorded in variables EIHPAY1 to EIHPAY3, EIHPAY95, EIHPAY96]***

How were these costs financed? CODE ALL THAT APPLY

1 Paid using savings/earnings

2 Took out a loan

3 Have not yet paid

95 Other (specify)

96 Don't know

*IF Costs were financed an other way [EiHPay= 95 (other)]*

**EIHPAYO @**

INTERVIEWER: Write in how the costs are financed.

STRING 80

END FILTER

END FILTER

END FILTER

END FILTER

## ***Financing the funeral***

### **EIFUN @**

I asked you earlier about expenses incurred for the health care that [^deceased ELSA respondent's name] received.

Now I would like to ask you about expenses which were associated with [^his/her] funeral, or legal fees related to [^his/her] death.

INTERVIEWER: Press and to continue.

Range: 1..1

### **EIDCSTB**

Did [^deceased ELSA respondent's name] have an insurance policy specifically designed to cover [^his/her] funeral expenses?

1 Yes, covered it partially

2 Yes, covered it totally

3 No

*IF had an insurance policy [EiDcstb=1 or 2]*

|

| **EIFUINS @** (see DVEIFUINS grouped for non-disclosure)

| In total, how much did this insurance pay out?

| Range: 0..999997

|

END FILTER

*IF had no insurance or partial insurance policy [EiDcstb= 2 or 3]*

|

| **EIDCSTA @** (see DVEIDCSTA grouped for non-disclosure)

| What was the total cost of the funeral expenses and legal fees[^after the insurance payment]?

| Range: 0..999997

**EIFUNREL**

*[Multiple responses to EIFUNREL are recorded in variables EIFUNR01 to EIFUNR23 and EIFUNR47 to EIFUNR51 for answers backcoded from other EIRRELOT ]*

SHOW CARD EI11

Who [^else] paid for the funeral expenses (that is what is their relationship to [^deceased ELSA respondent's name])? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*If other relative or other non-relative paid [EiFunRel= 22 or 23]*

**EIRRELOT** @ (answers backcoded into EIFUNR47 to EIFUNR51)

INTERVIEWER: The respondent has answered 'other' relationship: Write in relationship to

[^deceased ELSA respondent's name].

STRING 100

END FILTER

*If respondent paid towards funeral expenses [(EiFunRel=1) AND (EiFunRel.CARDINAL >= 2)]*

**EITOTRES** @ (see DVEITOTRES grouped for non-disclosure)

In total, how much did you pay towards [^deceased ELSA respondent's name]'s funeral expenses?

Range: 0..999997

END FILTER



## **Work and pensions**

### **EIWORINT @**

Now I'd like to ask you some questions about [^deceased ELSA respondent's name]'s employment situation since we last spoke to [^him/her].

1 Continue

### **EIWORKA**

Did [^deceased ELSA respondent's name] do any paid work in the time since we last interviewed [^him/her] on [^date of deceased ELSA respondent's last interview].

1 Yes - Full time

2 Yes - part time

3 Yes - from time to time

4 No

5 Don't know

*IF deceased did paid work from time to time since last interview [EiWorkA = 3]*

|

### **EIWHNTM**

| When was the last time [^deceased ELSA respondent's name] worked?

| INTERVIEWER: Enter month.

| 01 January

| 02 February

| 03 March

| 04 April

| 05 May

| 06 June

| 07 July

| 08 August

| 09 September

| 10 October

| 11 November

| 12 December

|

### **EIWHNTY**

| (When was the last time [^deceased ELSA respondent's name] worked?)

| INTERVIEWER: Enter year.

| Range: 2002..2900

|

ELSE

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| | *IF did paid work since the last interview [EiWorkA = 1 or 2]*

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### **EISTOP**

| | Had [^deceased ELSA respondent's name] stopped working before [^his/her] death?

| | 1 Yes

| | 2 No

| |

| |

| |

| |

| |

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| | *IF Had stopped working before death [EiStop = Yes]*

| |

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| |

### **EIWHEN**

| | In what month and year did [^he/she] stop working?

| |

| |

| |

| |

| |

| |

INTERVIEWER: Enter month.

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

**EIWHENY**

INTERVIEWER: Enter year.

Range: 1900..2050

**EIWHY**

*[Multiple responses to EIWHY are recorded in variables EIWHY01 to EIWHY15, EIWHY95]*

SHOW CARD EI12

Why did [^he/she] stop working?

INTERVIEWER: Code all that apply.

- 01 Own ill health or disability
- 02 Working was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Took voluntary redundancy
- 07 Could not find another job
- 08 Could afford to stop working
- 09 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 15 Retired
- 95 Other reason

*IF stopped for other reason [EiWhy=95 (other)]*

**EIWHYOTH @**

What was the reason?

INTERVIEWER: Write in.

STRING 200

END FILTER

END FILTER

END FILTER

|  
END FILTER

**EIPENM**

Was [^he/she] a member of a private pension plan, including employer provided, personal, stakeholder, or any other scheme?

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

*IF member of a private plan [EiPenM = Yes]*

|  
**EIPENN**

| How many pension funds did [^deceased ELSA respondent's name] have?

| Range: 1..8

| *IF response to number of pension funds [EiPenN = RESPONSE]*

| | |  
| | | **EIPTYPE (note at Wave 4 and 6 there were additional categories introduced)**  
| | | **[Loop: Responses to EIPTYPE are recorded in variables EIPTYP1 to EIPTYP8]**

| | | SHOW CARD E113

| | | What type of pension scheme was this [^first\second etc] scheme?

- | | | 1 Employer provided (occupational) scheme
- | | | 2 Private Personal pension scheme
- | | | 3 Group Personal pension
- | | | 4 Stakeholder pension
- | | | 5 S226 plan
- | | | 6 Retirement Annuity pension (pre 86 PPPs)
- | | | 9 other retirement saving scheme

| | | *IF employer provided scheme [EiPType = 1*

| | | **EIEMP @**

| | | What is the name of the employer provided scheme?

| | | INTERVIEWER: If police, local authority etc, probe for name of force/local authority etc. WRITE IN.

| | | STRING 80

| | |  
| | | END FILTER

**EIPEN**

*[Loop and multiple responses: Responses to EIPEN are recorded in variables EIPEN1 to EIPEN5, EIPEN95, EIPEN96 for Loop 1; EIPEN6 to EIPEN10, EIPEN97, EIPEN98 for Loop 2; EIPEN11 to EIPEN15, EIPEN99, EIPEN100 for Loop 3; EIPEN16 to EIPEN20, EIPEN102, EIPEN103 for Loop 4]*

When [^he/she] died, what happened to [^his/her] [^ pension type from EiPType]? ...READ OUT...  
CODE ALL THAT APPLY.

- 1 Someone is receiving regular payments
- 2 Someone received a lump sum payment
- 3 Someone expects to receive regular payments in the future
- 4 Someone expects to receive a lump sum payment in the future
- 5 Payments were lost
- 95 Other (specify at next question)
- 96 Don't know

*IF other happened to pension scheme [EiPen=95 (other)]*

**EIPENO @**

*[Loop: Responses to EIPENO are recorded in variables EIPENO1 to EIPENO8]*

INTERVIEWER: Enter details.  
STRING 100

END FILTER

*IF Now IN EiPen OR Received IN EiPen OR ExpectP IN EiPen OR ExpectL*

*/ / / IN EiPen [((Now IN EiPen) OR (Received IN EiPen)) OR (ExpectP IN EiPen)) OR*

*/ / / (ExpectL IN EiPen)]*

**EIPENWHO**

*[Loop: Responses to EIPENWHO are recorded in variables EIPENWho to EIPENWh2..8]*

SHOW CARD EI14

Who is receiving or expects to receive payments?

INTERVIEWER: Code one only. If respondent is son or daughter code 'Respondent', and not son/daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister

- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative expects to receive payments [EiPenWho = 22]*

**EIPENWR @**

INTERVIEWER: Please specify the other relative.  
STRING 80

ELSE

*IF other non-relative expects to receive payments [EiPenWho = 23]*

**EIPENWN @**

INTERVIEWER: Please specify the other non-relative.  
STRING 80

END FILTER

END FILTER

*IF expect to receive regular payments in future [EIPen =3]*

**EIPENXPM**

***[Loop: Responses to EIPENXPM are recorded in variables EIPENXPM1 to EIPENXP1..8]***

In what month and year do [^you/they] expect to start receiving these regular payments?

INTERVIEWER: Enter month.

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

**EIPENXPY**

***[Loop: Responses to EIPENXPY are recorded in variables EIPENXPY1 to EIPENXPY8]***

INTERVIEWER: Enter year.  
Range: 2002..2900

**EIPENXPA**

**[Loop: Responses to EIPENXPA are recorded in variables EIPENXPA1 to EIPENXPA4]**

How much do [^you/they] expect to receive per month?

Range: 0..999997

*IF EiPenxpa not answered [EiPenxpa = NONRESPONSE]*

| EiPenxpB

| Is it.....

| BRACKETS (250, 500, 1000, 2500)

| [Loop: Bracket results are recorded in EiPexpl1 to EiPexpl4, EiPexpu1 to EiPexpu4 ,

| EiPexpe1 to EiPexpe4, EiPexpr1 to EiPexpr4]

| END FILTER

END FILTER

*IF expect to receive lumpsum in future [EIPen =4]*

**EIPENXLM**

**[Loop: Responses to EIPENXLM are recorded in variables EIPENXLM1 to EIPENXLM4]**

In what month and year do [^you/they] expect to receive the lump sum?

INTERVIEWER: Enter month.

01 January

02 February

03 March

04 April

05 May

06 June

07 July

08 August

09 September

10 October

11 November

12 December

**EIPENXLY**

**[Loop: Responses to EIPENXLY are recorded in variables EIPENXLY1 to EIPENXLY8]**

INTERVIEWER: Enter year.

Range: 2002..2900

**EIPENXLA**

**[Loop: Responses to EIPENXLA are recorded in variables EIPENX1 to EIPENX4]**

How much do [^you/they] expect the lump sum to amount to?

Range: 0..999997

*IF EiPenxla = NONRESPONSE [EiPenxla = NONRESPONSE]*

| EiPenxIB

| Is it.....

| BRACKETS (5000, 10000, 50000, 100000)

| [Loop: Bracket results are recorded in EiPexll1 to EiPexll4, EiPexlu1 to EiPexlu4 , EiPexle1

| to EiPexle4, EiPexlr1 to EiPexlr4]

```

| | | | | END FILTER
| | | | | END FILTER
| | | | | IF someone is receiving regular payments [EiPen=1]
| | | | |
| | | | | EIPENPD
| | | | | [Loop: Responses to EIPENPD are recorded in variables EIPENPD1 to EIPENPD4]
| | | | | Thinking about the last regular payment [^you/they] received, what period did
| | | | | this cover?
| | | | | 01 One week
| | | | | 02 Two weeks
| | | | | 03 Three weeks
| | | | | 04 Four weeks
| | | | | 05 Calendar month
| | | | | 07 Two Calendar months
| | | | | 08 Eight times a year
| | | | | 09 Nine times a year
| | | | | 10 Ten times a year
| | | | | 13 Three months/13 weeks
| | | | | 26 Six months/26 weeks
| | | | | 52 One Year/12 months/52 weeks
| | | | | 90 Less than one week
| | | | | 95 One off/lump sum
| | | | | 96 None of these (Explain in a note)
| | | | |
| | | | | EIPENPA
| | | | | [Loop: Responses to EIPENPA are recorded in variables EIPENPA1 to EIPENPA4]
| | | | | How much did [^you/they] receive?
| | | | | Range: 0..99997
| | | | |
| | | | | IF amount not given but period was given [EiPenpA = NONRESPONSE AND (EiPenPd =
| | | | | RESPONSE)]
| | | | |
| | | | | IF EiPenPd IN [OneWeek .. ThrWeek] [EiPenPd IN [OneWeek ..
| | | | | ThrWeek]]
| | | | |
| | | | | EiPenpW
| | | | | Was it.....
| | | | | BRACKETS (50, 100, 250, 500)
| | | | | [Loop: Bracket results are recorded in EiPerw1 to EiPerw4 , EiPerwu1 to EiPerwu4 ,
| | | | | EiPerwe1 to EiPerwe4, EiPerwr1 to EiPerwr4]
| | | | |
| | | | | ELSE
| | | | |
| | | | | IF EiPenPd IN [Fourweek .. OneYear] [EiPenPd IN [Fourweek ..
| | | | | OneYear]]
| | | | |
| | | | | EiPenpM
| | | | | Was it.....
| | | | | BRACKETS (250, 500, 1000, 2500)
| | | | | [Bracket results are recorded in EiPerm1 to EiPerm4 , EiPermu1 to EiPermu4 ,
| | | | | EiPerme1 to EiPerme4, EiPermr1 to EiPermr4]

```



## **Assets and inheritances**

### **EIASSINT @**

I would now like to ask you some questions about what happened to [^deceased ELSA respondent's name]'s assets after [^his/her] death.

1 Continue

### **EIASCK**

Can I just check, has [^deceased ELSA respondent's name]'s estate been distributed yet?"

1 Yes

2 No

*If estate has been distributed [EIASCK=yes]*

### **EIWILLA**

Did [^deceased ELSA respondent's name] have a Will?

1 Yes

2 No

3 Don't know

*If did not have a will or does not know [EiWilla=no or don't know]*

### **EIKIN**

SHOW CARD EI14

Who was [^deceased ELSA respondent's name]'s next of kin?

INTERVIEWER: Code one only. If respondent is son or daughter code 'Respondent', and not son/daughter. Only code 'Son' or 'Daughter' for those other than respondent.

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

20 Grandchild

21 Grandparent

22 Other relative (specify at next question)

23 Other non-relative (specify at next question)

*If next of kin was other relative or other non-relative [EiKin =22 or 23]*

```

| |
| | EIKINO @
| | INTERVIEWER: The respondent has answered 'other' relationship: Write in relationship to
| | [^deceased ELSA respondent's name].
| | STRING 100
| |
| | END FILTER
| |
| | ELSE
| |
| | IF had a Will [EiWillA = Yes]
| |
| | EIEXEC
| | Are you the legal executor of the Will?
| | 1 Yes
| | 2 No
| | 3 Don't know
| |
| | EIBEN
| | Are you a beneficiary of the Will?
| | 1 Yes
| | 2 No
| | 3 Don't know
| | 4 SPONTANEOUS - Assets not yet been shared out
| |
| | EIPROB
| | Did/Does [^deceased ELSA respondent's name]'s Will need to go to probate?
| | 1 Yes
| | 2 No
| | 3 Don't know
| |
| | IF will needed to go to probate [EiProb = Yes]
| |
| | EIWILLB
| | Has [^his/her] Will been through probate?
| | 1 Yes
| | 2 No
| | 3 Don't know
| |
| | IF will has not been through probate [EiWillB = No]
| |
| | EIWILLPRO @@
| | What is the total value of [^deceased ELSA respondent's name]'s assets?
| | Range: 1..999997
| |
| | END FILTER

```

**EIHOME**

Did [^deceased ELSA respondent's name] own [^his/her] main home or share of [^his/her] main home when [^he/she] died? By main home I mean the place where [^he/she] lived most of the time (before they moved into an institution).

INTERVIEWER: Other properties [^he/she] may have owned will be covered later.

1 Yes

2 No

*IF owned main home or share [EiHome = Yes]*

*| | IF respondent is husband or wife or partner of deceased or spouse of deceased is still alive [(EiRRel =1 or 2) or (SurvSp = Yes)]*

**EISP**

Did [^you/ their spouse/partner] inherit the home or [^deceased ELSA respondent's name]'s share of the home?

1 Yes

2 No

*IF respondent/ spouse did not inherit the home or share of home [EiSp = No]*

**EISPOWN**

[^Do you/ Does their spouse/partner] currently own a share of the home?

1 Yes

2 No

*IF currently own a share of the home [EiSpOwn = Yes]*

**EISPSH**

What share of the home [^do/does you/ their spouse/partner] currently own?

INTERVIEWER: Code how question will be answered

1 As a percentage

2 As a fraction

3 As a monetary amount

*IF share expressed as percentage [EiSpSh = 1]*

**EISPP**

(What share of the home [^do you/ does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF share expressed as fraction [EiSpSh = 2]*

**EISPF @@**

(What share of the home [^do you/ does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF share expressed as an amount [EiSpSh =3]*

**EISPA**

(What share of the home [^do you/ does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF did inherit the home or share of the home [EiSp = Yes]*

**EISPINH**

Did [^you/their spouse/partner] inherit the home (or [^deceased ELSA respondent's name]'s share of the home) solely or jointly with some other people?

1 Solely inherited

2 Jointly inherited

END FILTER

*IF did inherit the home jointly [EiSpInH = 2]*

**EISHARE**

What share of the home did [^deceased ELSA respondent's name] own?

INTERVIEWER: Code how question will be answered

1 As a percentage

2 As a fraction

3 As a monetary amount

*IF deceased's share expressed as a percentage [EiShare = 1]*

**EISHP**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF deceased's share expressed as a fraction [EiShare = 2]*

**EISHF @@**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF deceased's share expressed as an amount [EiShare = 3]*

**EISHA**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

*IF did not inherit home or inherited jointly [(EiSp = No) OR (EiSplnH = 2)]*

**EIHOWH**

*[Multiple responses to EIHOWH are recorded in variables EIHOWH01 to EIHOWH23]*

SHOW CARD E114

[^Who inherited the home/ deceased ELSA respondent's name share] (that is, what is their relationship to [^deceased ELSA respondent's name])?

CODE ALL THAT APPLY

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative inherited home/ share of home [EiHowH=22]*

**EIHOWOR @**

INTERVIEWER: Please specify the other relative.  
STRING 60

END FILTER

*IF other non-relative inherited home/ share of home [EiHowH=23]*

**EIHOWON @**

INTERVIEWER: Please specify the other non-relative.  
STRING 60

END FILTER

*IF SHOW CARD EI14 (that is, wh = RESPONSE [EiHowH =  
/ / / RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.QHomSp.idy IN EiHowH [idy IN EiHowH]*

**EIHOWN**

***[Loop: Responses to EIHOWN are recorded in variables EIHOWN01 to EIHOWN23]***

How many [^type of relative from EIHOWH] are you referring to?

INTERVIEWER: If same relationship, do not include respondent here.

Range: 1..20

END FILTER

END FILTER

END FILTER

*IF only one answer coded at EIHOWH (EiHowN[EiHowH[1].ORD] = 1)*

*IF not husband/ wife or partner who inherited the home [EiHowH<>2 and EiHowH<>3]*

**EIHOLIV**

INTERVIEWER ASK OR CODE: Does this person live in this home at present?

1 Yes

2 No

END FILTER

ELSE (i.e. more than one type of relative coded at EIHOWH)

**EIHOLV**

Do any of these people currently live in that home?

- 1 Yes
- 2 No

*IF any of these people currently live in that home [EiHoLv = Yes]*

**EIHOLW**

***[Multiple responses to EIHOLW are recorded in variables EIHOLW01 to EIHOLW23]***

SHOW CARD EI14

Who lives in the house at present? CODE ALL THAT APPLY.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

END FILTER

END FILTER

END FILTER

**EISPLIVE**

INTERVIEWER ASK OR CODE: Does [^deceased ELSA respondent's name]'s spouse/partner live in that home at present?

- 1 Yes
- 2 No

*IF no one lives in the house [(EiHoLiv <> Yes) AND (EiHoLv <> Yes)] AND (EiSpLive <> Yes)]*

**EIHOSLD** (see also EIHOSZ for backcoded answers)

What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF other has happened to that home [EiHoSld = 95 (Other)]*

**EIHOSOTH @**

INTERVIEWER: Record what has happened to the home.  
STRING 100

END FILTER

END FILTER

**EIHOA @** (see DVEIHOA grouped for non-disclosure)

What [^was/is] the [^value/selling price] of that home?

Range: 1..9999997

*IF no answer to value question [EiHoa = NONRESPONSE]*

**EiHoab**

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EiHol, EiHou, EiHoe, EiHor]

END FILTER

**EIHOMG**

Was there any outstanding mortgage on this home (before any insurance might have paid the outstanding balance)?

- 1 Yes
- 2 No

*IF there was outstanding mortgage [EiHoMg = Yes]*

**EIHOMGI**

Did [^deceased ELSA respondent's name] have any insurance policies that will pay off or have paid off the mortgage either in full or partially?

- 1 Yes, In full
- 2 Yes, partially
- 3 No

*IF deceased did not have insurance policy to pay off mortgage fully [EiHoMgl=2 or 3]*

**EIHOMGA**

How much was the outstanding balance on this mortgage [^after the insurance policy pay out]?  
Range: 1..9999997

*IF no answer to the outstanding balance [EiHoMga = NONRESPONSE]*

**EiHoMgab**

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in EiHobl, EiHobu, EiHobe, EiHobr]

END FILTER

END FILTER

END FILTER

ELSE

**EIJOINT**

Did [^deceased ELSA respondent's name] own this home jointly with someone else?

1 Yes

2 No

*IF deceased owned home jointly [EiJoint = Yes]*

**EIOTH0**

**[Multiple responses to EIOTH0 are recorded in variables EIOTH001 to EIOTH023]**

Who else owned the house with [^deceased ELSA respondent's name] when [^he/she] died?

INTERVIEWER: CODE ALL THAT APPLY INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

20 Grandchild

21 Grandparent

22 Other relative (specify at next question)

23 Other non-relative (specify at next question)

*IF who else owned the house with deceased was answered [EiOthO = RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.QHomNo.idy IN EiOthO [idy IN EiOthO]*

**EIOTHN**

**[Loop: Responses to EIOTHN are recorded in variables EIOTHN01 to EIOTHN23]**

How many [^type of relative from EIOTHO] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

**EIOSHARE**

What share of the house did [^deceased ELSA respondent's name] own?

1 As a percentage

2 As a fraction

3 As a monetary amount

*IF share of house expressed as a percentage [EiOShare = 1]*

**EIOSHP**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF share of house expressed as a fraction [EiOShare = 2]*

**EIOSHF @@**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF share of house expressed as an amount [EiOShare = 3]*

**EIOSHA**

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

**EIOIN**

Did only those with joint ownership inherit [^deceased ELSA respondent's name]'s share of the house?

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

*IF it was not only those with joint ownership who inherited deceased's share [Eioln = No]*

**EIOINW**

***[Multiple responses to EIOINW are recorded in variables EIOINW01 to EIOINW23]***

Who else inherited [^deceased ELSA respondent's name]'s share of the home?

INTERVIEWER: DO NOT CODE JOINT OWNERS AGAIN INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

LOOP FOR idy:= 4 TO 23

*IF QFinance.QHomNo.idy IN EiolnW [idy IN EiolnW]*

**EIOINN**

***[Loop: Responses to EIOINN are recorded in variables EIOINN01 to EIOINN23]***

How many [^type of relative at EIOINW] are you referring to?

Range: 1..20

END FILTER

```

| | | END FILTER
| | |
| | | END FILTER
| | |
| | | ELSE (i.e. IF house was not jointly owned)
| | | EioHwH
| | | SHOW CARD EI14
| | | Who inherited this home (that is, what is their relationship to
| | | [^deceased ELSA respondent's name])?
| | | CODE ALL THAT APPLY
| | | INTERVIEWER: Only code once for respondent. For example if
| | | respondent is son or daughter code 'Respondent', and not son or
| | | daughter. Only code 'Son' or 'Daughter' for those other than
| | | respondent.
| | | 01 Respondent (you)
| | | 02 Husband/Wife
| | | 03 Partner/cohabitee
| | | 04 Natural son/daughter
| | | 05 Adopted son/daughter
| | | 06 Foster son/daughter
| | | 07 Step-son/step-daughter/child of partner
| | | 08 Son-in-law/daughter-in-law
| | | 09 Natural parent
| | | 10 Adoptive parent
| | | 11 Foster parent
| | | 12 Step-parent/parent's partner
| | | 13 Parent-in-law
| | | 14 Natural brother/sister
| | | 15 Half-brother/sister
| | | 16 Step-brother/sister
| | | 17 Adopted brother/sister
| | | 18 Foster brother/sister
| | | 19 Brother-in-law/sister-in-law
| | | 20 Grandchild
| | | 21 Grandparent
| | | 22 Other relative (specify at next question)
| | | 23 Other non-relative (specify at next question)
| | |
| | | IF who inherited the home was answered [EioHwH = RESPONSE]
| | |
| | | LOOP FOR idy:= 4 TO 23
| | |
| | | IF QFinance.QHomNo.idy IN EioHwH [idy IN EioHwH]
| | |
| | | EIOHWN
| | | [Loop: Responses to EIOHWN are recorded in variables EIOHWN01 to EIOHWN23]
| | | How many [^type of relative at EIOHWH] are you referring to?
| | | Range: 1..20
| | |
| | | END FILTER
| | |
| | | END FILTER

```

END FILTER

END FILTER

*If only one type of relative mentioned at EioHwH*

*[(((EioThO.CARDINAL = 1) AND (EioThN[EioThO[1].ORD] = 1)) AND (EioIn = Yes)) OR ((EioHwH.CARDINAL = 1) AND (EioHwN[EioHwH[1].ORD] = 1))]*

**EIOHLIV**

INTERVIEWER: ASK OR CODE: Does this person live in the home at present?

- 1 Yes
- 2 No

ELSE (i.e. more than one relative mentioned at EioHwH)

**EioHLv**

Do any of these people who now own the property currently live in that home?

- 1 Yes
- 2 No

*If any who now own the property currently live in that home [EioHLv = Yes]*

**EIOHLW**

***[Multiple responses to EIOHLW are recorded in variables EIOHLW01 to EIOHLW23]***

Who lives in the house at present? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

ELSE

*IF none of owners live in home [EioHLv = No]*

**EIOHSLD**

What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF other has happened to the home [EioHSld = 95 (Other)]*

**EIOHSO @**

INTERVIEWER: Record what has happened to the home.  
STRING 100

END FILTER

END FILTER

END FILTER

END FILTER

**EIOHA @** (see DVEIOHA grouped for non-disclosure)

What [<sup>^</sup>is/was] the [<sup>^</sup>value/selling price] of that home?

Range: 1..9999997

*IF value of home not answered [EioHa = NONRESPONSE]*

**EioHab**

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EioHI, EioHu, EioHe, EioHr]

END FILTER

**EIOHMG**

Was there any outstanding mortgage on this home (before any insurance might have paid the outstanding balance)?

- 1 Yes
- 2 No

*IF there was outstanding mortgage [EioHMg = Yes]*

**EIOHMG1**

Did [^deceased ELSA respondent's name] have any insurance policies that will pay off or have paid off the mortgage either in full or partially?

- 1 Yes, In full
- 2 Yes, partially
- 3 No

*IF deceased did not have insurance policy to pay off mortgage fully [EioHMgl =2 or 3]*

**EIOHMGA**

How much was the outstanding balance on this mortgage [^after the insurance policy pay out]?

Range: 1..999997

*IF no response to outstanding balance [EioHMga = NONRESPONSE]*

**EioHMgab**

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in EioHbl, EioHbu, EioHbe, EioHbr]

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

**EIPRP**

Did [^deceased ELSA respondent's name] own any property, or share of any property, other than their main home

when [^he/she] died? (Exclude business property and other non-residential property, include holiday homes and timeshares.)

- 1 Yes
- 2 No

*IF deceased owned property other than main home [EiPrp = Yes]*

**EIPRPN**

How many other properties did [^deceased ELSA respondent's name] own?

Range: 1..20

*IF number of properties answered [EiPrpN = RESPONSE]*

LOOP FOR idx:= 1 TO EiPrpN

*IF respondent is husband or wife or partner of deceased or spouse of deceased is still alive | | |*  
*[(EiRRel = 1 or 2) or (SurvSp = Yes)]*

**EISP** (EISP2 for first other home)

***[Loop: Responses to EISP are recorded in variable EISP2 as maximum number of other properties was 1 so only one loop]***

Did [^you/ their spouse/partner inherit the [first] home or [^deceased ELSA respondent's name]'s share of the home?

1 Yes

2 No

*IF respondent or spouse/partner did not inherit the first other home [EiSp = No]*

**EISPOWN** (EISPOWN02 for first other home)

***[Loop: Responses to EISPOWN are recorded in variable EISPOW2 as maximum number of other properties was 1 so only one loop]***

[^Do you/ does their spouse/partner] currently own a share of the home?

1 Yes

2 No

*IF respondent or spouse partner owns share of the home [EiSpOwn = Yes]*

**EISPSH** (EISPSH2 for first other home)

***[Loop: Responses to EISPSH are recorded in variable EISPSH2 as maximum number of other properties was 1 so only one loop]***

What share of the home [^do you/ does their spouse/partner] currently own?

INTERVIEWER: Code how question will be answered

1 As a percentage

2 As a fraction

3 As a monetary amount

*IF share of home expressed as a percentage [EiSpSh = 1]*

**EISPP** (EISPP2 for first other home)

***[Loop: Responses to EISPP are recorded in variable EISPP2 as maximum number of other properties was 1 so only one loop]***

(What share of the home [^do you/does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF share of home expressed as a fraction [EiSpSh = 2]*

**EISPF @**

***[Loop: Responses to EISPF are recorded in variable EISPF2 as maximum number of other properties was 1 so only one loop]***

(What share of the home [^do you/does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF share of home expressed as an amount [EiSpSh = 3]*

**EISPA** (EISPA2 for first other home)

***[Loop: Responses to EISPA are recorded in variable EISPA2 as maximum number of other properties was 1 so only one loop]***

(What share of the home [^do you/does their spouse/partner] currently own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF respondent or spouse/partner inherited the first other home [EiSp = Yes]*

**EISPINH** (EISPINH2 for first other home)

***[Loop: Responses to EISPINH are recorded in variable EISPIN2 as maximum number of other properties was 1 so only one loop]***

Did [^you/their spouse/partner] inherit the home (or [^deceased ELSA respondent's name]'s share of the home) solely or jointly with some other people?

1 Solely inherited

2 Jointly inherited

END FILTER

*IF first other home inherited jointly [EiSpInH = 2]*

**EISHARE** (EISHARE2 for first other home)

***[Loop: Responses to EISHARE are recorded in variable EISHAR2 as maximum number of other properties was 1 so only one loop]***

What share of the home did [^deceased ELSA respondent's name] own?

INTERVIEWER: Code how question will be answered

1 As a percentage

2 As a fraction

3 As a monetary amount

*IF share of home expressed as a percentage [EiShare = 1]*

**EISHP** (EISHP2 for first other home)

***[Loop: Responses to EISHP are recorded in variables EISHP2 as maximum number of other properties was 1 so only one loop]***

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE



*IF respondent/ spouse/ partner does not own all of home [(EiSp = No) OR (EiSplnH = 2)]*

**EIHOWH** (EISHA39..61 for first other home)

**[Multiple responses to EIHOWH are recorded in variables EIHOWH39 to EIHOWH61]**

SHOW CARD EI14

[^Who inherited this home/ deceased ELSA respondent's name's share] (that is, what is their relationship to [^deceased ELSA respondent's name])? CODE ALL

THAT APPLY

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative owns home/share [EiHowH=22]*

**EIHOWOR @**

INTERVIEWER: Please specify the other relative.

STRING 60

END FILTER

*IF other non-relative owns home/share [EiHowH=23]*

**EIHOWON @**

INTERVIEWER: Please specify the other non-relative.

STRING 60

END FILTER

*IF answer given to relationship of owner [EiHowH = RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy IN EiHowH [idy IN EiHowH]*

**EIHOWN** (EIHOWN24 to 46 for first other home)

**[Loop: Responses to EIHOWN are recorded in variables EIHOWN24 to EIHOWN46]**

How many [^type of relative from EIHOWH] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

*IF only one answer at EIHOWH*

*[(EiHowH.CARDINAL = 1) AND (EiHowN[EiHowH[1].ORD] = 1)]*

*IF first other home not owned by husband/wife/partner [EiHowH<>1 & EiHowH<>2]*

**EIHOLIV** (EIHOLIV2 for first other home)

**[Loop: Responses to EIHOLIV are recorded in variable EIHOLIV2 as maximum number of other properties was 1 so only one loop]**

INTERVIEWER ASK OR CODE: Does this person live in this home at present?

1 Yes

2 No

END FILTER

ELSE (i.e. more than one relative given at EIHOWH)

**EiHoLv** (EIHOLV2 for first other home)

Do any of these people currently live in that home?

1 Yes

2 No

*IF any of these people currently live in home [EiHoLv = Yes]*

**EIHOLW** (EIHOLW24 to 46 for first other home)

**[Multiple responses to EIHOLW are recorded in variables EIHOLW24 to EIHOLW 46 as maximum number of other properties was 1 so only one loop]**

SHOW CARD E114

Who lives in the house at present? CODE ALL THAT APPLY.

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

END FILTER

END FILTER

END FILTER

**EISPLIVE** (EISPLIV2 for first other home)

***[Loop: Responses to EISPLIVE are recorded in variable EISPLIV2 as maximum number of other properties was 1 so only one loop]***

INTERVIEWER ASK OR CODE: Does [^deceased ELSA respondent's name]'s spouse/partner live in that home at present?

- 1 Yes
- 2 No

*IF no one lives in the home [((EiHoLiv <> Yes) AND (EiHoLv <> Yes)) AND (EiSpLive <> Yes)]*

**EIHOSLD** (EIHOSLD2 for first other home)

***[Loop: Responses to EIHOSLD are recorded in variable EIHOSLD2 as maximum number of other properties was 1 so only one loop]***

What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF Other has happened to home [EiHoSld = 95 (Other)]*

**EIHOSOTH @**

INTERVIEWER: Record what has happened to the home.  
STRING 100

END FILTER

END FILTER

**EIHOA @** (see DVEIHOA2 for first other home grouped for non-disclosure)  
**[Loop: Responses to EIHOA are recorded in variable EIHOA2 as maximum number of other properties was 1 so only one loop]**

What [^is/was] the [^value/ selling price] of that home?  
Range: 1..9999997

*IF no response to value of home [EiHoa = NONRESPONSE]*

**EiHoab** (for first other home)

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EiHool1, EiHoou1, EiHooe1, EiHoor1]

END FILTER

**EIHOMG** (EIHOMG2 for first other home)

**[Loop: Responses to EIHOMG are recorded in variable EIHOMG2 as maximum number of other properties was 1 so only one loop]**

Was there any outstanding mortgage on this home (before any insurance might have paid the outstanding balance)?

1 Yes

2 No

*IF there was outstanding balance on mortgage [EiHoMg = Yes]*

**EIHOMGI** (EIHOMGI2 for first other home)

**[Loop: Responses to EIHOMGI are recorded in variables EIHOMGI2 as maximum number of other properties was 1 so only one loop]**

Did [^deceased ELSA respondent's name] have any insurance policies that will pay off or have paid off the mortgage either in full or partially?

1 Yes, In full

2 Yes, partially

3 No

*IF deceased did not have insurance policy to pay off mortgage fully [EiHoMgl 2 or 3]*

**EIHOMGA** (EIHOMGA2 for first other home)

**[Loop: Responses to EIHOMGA are recorded in variables EIHOMGA2 as maximum number of other properties was 1 so only one loop]**

How much was the outstanding balance on this mortgage [mgtxt]?

Range: 1..9999997

*IF no response to outstanding balance [EiHoMga = NONRESPONSE]*

**EiHoMgab** (first other home)

Was it.....

BRACKETS (2500, 5000, 15000, 50000)

[Bracket results are recorded in EiHobol1, EiHobou1, EiHoboe1, EiHobor1]

END FILTER

END FILTER  
END FILTER  
ELSE

**EIJOINT** (EIJOINT2 for first other home)

***[Loop: Responses to EIJOINT are recorded in variables EIJOINT 2 as maximum number of other properties was 1 so only one loop]***

Did [^deceased ELSA respondent's name] own this home jointly with someone else?

1 Yes

2 No

*IF deceased owned home jointly [EiJoint = Yes]*

**EIOTHO** (EIOTHO24 to 46 for first other home)

***[Multiple responses to EIOTHO are recorded in variables EIOTHO24 to EIOTHO46]***

Who else owned the house with [^deceased ELSA respondent's name] when [^he/she] died?

INTERVIEWER: CODE ALL THAT APPLY

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF Response given to who else owned home [EiOthO = RESPONSE]*

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy IN EiOthO [idy IN EiOthO]*

**EIOTHN @**

***[Loop: Responses to EIOTHN are recorded in variables EIOTHN2 as maximum number of other properties was 1 so only one loop]***

How many [^types of relative from EIOTHO] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

**EISHARE** (EISHARE2 for first other home)

***[Loop: Responses to EIOSHARE are recorded in variables EIOSHA01 as maximum number of other properties was 1 so only one loop]***

What share of the house did [^deceased ELSA respondent's name] own?

1 As a percentage

2 As a fraction

3 As a monetary amount

*IF share expressed as a percentage [EiOShare = 1]*

**EIOSHP** (EIOSHP2 for first other home)

***[Loop: Responses to EIOSHP are recorded in variables EIOSHP2 as maximum number of other properties was 1 so only one loop]***

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a percentage.

Range: 1..100

ELSE

*IF share expressed as a fraction [EiOShare = 2]*

**EIOSHF @@**

***[Loop: Responses to EIOSHF are recorded in variables EIOSHF2 as maximum number of other properties was 1 so only one loop]***

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as a fraction.

STRING 15

ELSE

*IF share expressed as an amount [EiOShare = 3]*

**EIOSHA** (EIOSHA2 for first other home)

***[Loop: Responses to EIOSHA are recorded in variables EIOSHA2 as maximum number of other properties was 1 so only one loop]***

(What share of the home did [^deceased ELSA respondent's name] own?)

INTERVIEWER: Give the answer as an amount.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

**EIOIN** (EIOIN2 for first other home)

***[Loop: Responses to EIOIN are recorded in variables EIOIN2 as maximum number of other properties was 1 so only one loop]***

Did only those with joint ownership inherit [^deceased ELSA respondent's name]'s share of the house?

1 Yes

2 No

3 Don't know

*IF it was not only those with joint ownership who inherited share of the house [EiIn = No]*

**EIOINW** (EIOINW24 to 46 for first other home)

***[Multiple responses to EIOINW are recorded in variables EIOINW24 to EIOINW46]***

Who else inherited [^deceased ELSA respondent's name]'s share of the home?

INTERVIEWER: DO NOT CODE JOINT OWNERS AGAIN

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

20 Grandchild

21 Grandparent

22 Other relative (specify at next question)

23 Other non-relative (specify at next question)

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy IN EioInW [idy IN EioInW]*

**EIOINN** (EIOINN24 to 46 for first other home)

**[Loop: Responses to EIOINN are recorded in variables EIOINN24 to EIOINN46]**

How many [^type of relative from EIOINW] are you referring to?

Range: 1..20

END FILTER

END FILTER

END FILTER

ELSE (*i.e. IF house was not jointly owned*)

**EioHwH** (EIOHWH24 to 46 for first other home)

**[Multiple responses to EIOINW are recorded in variables EioHwH24 to EioHwH46]**

SHOW CARD E114

Who inherited this home (that is, what is their relationship to

[^deceased ELSA respondent's name]?

CODE ALL THAT APPLY

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

20 Grandchild

21 Grandparent

22 Other relative (specify at next question)

23 Other non-relative (specify at next question)

*IF who inherited the home was answered [EioHwH = RESPONSE]*

```

| LOOP FOR idy:= 4 TO 23
|
| IF QFinance.QHomNo.idy IN EioHwH [idy IN EioHwH]
|
| |
| | EIOHWN (EIOHWN24 to 46 for first other home)
| | [Loop: Responses to EIOHWN are recorded in variables EIOHWN24 to EIOHWN46]
| | How many [^type of relative from EioHwH] are you referring to?
| | Range: 1..20
| |
| | END FILTER
| |
| | END FILTER
| |
| | END FILTER
| |
| END FILTER
|
| IF only one answer at EioHwH
| [(EioHwH.CARDINAL = 1) AND (EiHowN[EioHwH [1].ORD] = 1)]
|
| EIOHLIV (EIOHLIV2 for first other home)
| [Loop: Responses to EIOHLIV are recorded in variables EIOHLIV2 as maximum
| number of other properties was 1 so only one loop]
| INTERVIEWER: ASK OR CODE: Does this person live in the home at present?
| 1 Yes
| 2 No
|
| ELSE (i.e. more than one relative mentioned at EioHwH)
| EioHLv (EIOHLV2 for first other home)
| [Loop: Responses to EIOHLV are recorded in variables EIOHLV2 as maximum
| number of other properties was 1 so only one loop]
| Do any of these people who now own the property currently live in
| that home?
| 1 Yes
| 2 No
|
|
| IF any other owner lives in the home [EioHLv = Yes]
|
| EIOHLW (EIOHLW24 to 46 for first other home)
| [Multiple responses to EIOHLW are recorded in variables EIOHLW01 to EIOHLW23]
| Who lives in the house at present? CODE ALL THAT APPLY.
| 01 Respondent (you)
| 02 Husband/Wife
| 03 Partner/cohabitee
| 04 Natural son/daughter
| 05 Adopted son/daughter
| 06 Foster son/daughter
| 07 Step-son/step-daughter/child of partner
| 08 Son-in-law/daughter-in-law
| 09 Natural parent
| 10 Adoptive parent
| 11 Foster parent

```

- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

ELSE

*IF no one lives in the home [EioHLv = No]*

**EIOHSLD** (EIOHSLD2 for first other home)

***[Loop: Responses to EIOHSLD are recorded in variables EIOHSL2 as maximum number of other properties was 1 so only one loop]***

What has happened to that home?

- 1 It is currently empty
- 2 It is currently being let out (i.e. tenants living there)
- 3 It is currently on the market
- 4 It has already been sold
- 95 Other (specify at next question)

*IF other has happened to home [EioHSLd = 95 (Other)]*

**EIOHSO @**

INTERVIEWER: Record what has happened to the home.

STRING 100

END FILTER

END FILTER

END FILTER

END FILTER

**EIOHA** (EIOHA2 for first other home)

***[Loop: Responses to EIOHA are recorded in variables EIOHA2 as maximum number of other properties was 1 so only one loop]***

What [<sup>^</sup>is/was] the [<sup>^</sup>value/selling price] of that home?

Range: 1..9999997

*IF no response to value [EioHa = NONRESPONSE]*

**EioHab** (first other home)

Was it.....

BRACKETS (50000, 75000, 125000, 500000)

[Bracket results are recorded in EioHI2, EioHu2, EioHe2, EioHr2]

```

END FILTER

EIOHMG (EIOHMG2 for first other home)
[Loop: Responses to EIOHMG are recorded in variables EIOHMG2 as maximum
number of other properties was 1 so only one loop]
Was there any outstanding mortgage on this home (before any insurance
might have paid the outstanding balance)?
1 Yes
2 No

IF EioHMg = Yes [EioHMg = Yes]

EIOHMGI (EIOHMGI2 for first other home)
[Loop: Responses to EIOHMGI are recorded in variables EIOHMG2 as maximum
number of other properties was 1 so only one loop]
Did [^deceased ELSA respondent's name] have any insurance policies that will pay off or
have paid off the mortgage either in full or partially?
1 Yes, In full
2 Yes, partially
3 No

IF no insurance policy to pay of mortgage fully [EioHMGI =2 or 3]

EIOHMGA (EIOHMGA2 for first other home)
[Loop: Responses to EIOHMGA are recorded in variables EIOHMGA2 as maximum
number of other properties was 1 so only one loop]
How much was the outstanding balance on this mortgage [^after the insurance policy pay
out]?
Range: 1..9999997

IF no response to outstanding balance [EioHMga = NONRESPONSE]

EioHMgab (for first other home)
Was it.....
BRACKETS (2500, 5000, 15000, 50000)
[Bracket results are recorded in EioHI2, EioHu2, EioHe2, EioHr2]

END FILTER

```

**EIPHY**

Did [^deceased ELSA respondent's name] own a business or share in a business, including land or premises?

1 Yes

2 No

*IF owned a business or share [Elphy = Yes]*

**EIPHYA**

In total, how much were these business assets worth (after any debts had been paid off on them)?

Range: 0..9999997

*IF no response to value of business assets [ELPHYA = NONRESPONSE]*

**Elphyab**

Was it.....

BRACKETS (10000, 50000, 150000, 500000)

[Bracket results are recorded in Elphl, Elphu, Elphe, Elphr]

END FILTER

END FILTER

*IF owned a business or share of business [ELPHY = Yes]*

**EIPHYWH**

**[Multiple responses to EIPHYWH are recorded in variables EIPHYW01 to EIPHYW23]**

SHOW CARD EI14

Who inherited these business assets? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

01 Respondent (you)

02 Husband/Wife

03 Partner/cohabitee

04 Natural son/daughter

05 Adopted son/daughter

06 Foster son/daughter

07 Step-son/step-daughter/child of partner

08 Son-in-law/daughter-in-law

09 Natural parent

10 Adoptive parent

11 Foster parent

12 Step-parent/parent's partner

13 Parent-in-law

14 Natural brother/sister

15 Half-brother/sister

16 Step-brother/sister

17 Adopted brother/sister

18 Foster brother/sister

19 Brother-in-law/sister-in-law

20 Grandchild

- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF Other relative inherited business assets or share of business [EIPhyWh= 22]*

**EIPHYWR @**

INTERVIEWER: Please specify the other relative(s).

STRING 80

END FILTER

*IF Other non-relative inherited business assets or share of business [EIPhyWh= 23]*

**EIPHYWN @**

INTERVIEWER: Please specify the other non-relative(s).

STRING 80

END FILTER

*IF respondent inherited business assets [EIPhyWh=1]*

**EIPHYRES**

In total, how much did you inherit from these business assets?

Range: 0..9999997

END FILTER

*IF husband/wife inherited business assets [EIPhyWh=2]*

**EIINHSPS**

In total, how much did the husband/wife inherit from these business assets?

Range: 0..9999997

END FILTER

*IF partner inherited business assets [EIPhyWh=3]*

**EIINHPRT**

In total, how much did the partner/cohabitee inherit from these business assets?

Range: 0..9999997

END FILTER

LOOP FOR idy:= 4 TO 23

*IF QFinance.idy [idy IN EIPhyWh]*

**EINUMREL**

*[Loop: Responses to EINUMREL are recorded in variables EINUMRE04 to EINUMR23]*

How many [^type of relative from EIOTHAS] are you referring to?

INTERVIEWER: If same relationship, do not include respondent here.

Range: 1..20

*IF response to question about number of relatives [EiNumRel = RESPONSE]*

LOOP FOR idx:= 1 TO EiNumRel

**EIAMT**

*[Loop: Responses to EIAMT are recorded in variables EIAMT04 to EIAMT400]*

In total, how much did the [^first /second etc] [^type of relative from EIOTHAS] inherit [^from these]?

INTERVIEWER: Enter amount in pounds.

Range: 1..9999997

END FILTER

END FILTER

END FILTER

END FILTER

END FILTER

*IF will has been through probate and assets have been shared out [(QWill.EiBen <> NotYet)  
AND (QWill.EiWillB <> No)]*

**EIOTHAS**

*[Multiple responses to EIOTHAS are recorded in variables EIOTHA01 to EIOTHA24]*

SHOW CARD EI14

Excluding any housing, pensions, or businesses [^deceased ELSA respondent's name] had, who inherited the rest of [^his/her] assets? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister

- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)
- 96 No other assets inherited

*IF other relative inherited rest of assets [EiOthAs=22]*

**EIOTHWR @**

INTERVIEWER: Please specify the other relative(s).  
STRING 80

END FILTER

*IF other non-relative inherited rest of assets [EiOthAs=23]*

**EIOTHWN @**

INTERVIEWER: Please specify the other non-relative(s).  
STRING 80

END FILTER

*IF respondent inherited rest of assets [EiOthAs=1]*

**EIOTHRES @** (see DVEIOTHRES grouped for non-disclosure)  
In total, how much did you inherit from the rest of [^his/her] assets?  
Range: 0..9999997

END FILTER

*IF husband/wife inherited rest of assets [EiOthAs=2]*

**EIOTHSPS @** (see DVEIOTHSPS grouped for non-disclosure)  
In total, how much did the husband/wife inherit from the rest of [^his/her] assets?  
Range: 0..9999997

END FILTER

*IF partner inherited rest of assets [EiOthAs=3]*

**EIOTHPRT**  
In total, how much did the partner/cohabitee inherit from the rest of [^his/her] assets?  
Range: 0..9999997

END FILTER

```

| LOOP FOR idy:= 4 TO 23
|
| IF QFinance.idy IN SHOW CARD EI14 Excluding any [idy IN EiOthAs]
|
| EINUMREL
| [Loop: Responses to EINUMREL are recorded in variables EINUMR24 to EINUMR40]
| How many [^type of relative from EIOTHAS] are you referring to?
| INTERVIEWER: If same relationship, do not include respondent here.
| Range: 1..20
|
| IF responded to EINUMREL [EiNumRel = RESPONSE]
|
| LOOP FOR idx:= 1 TO EiNumRel
|
| EIAMT
| [Loop: Responses to EIAMT are recorded in variables EIAMT401 to EIAMT800]
| In total, how much did the [^first\second etc] [^type of relative from EIOTHAS] inherit [^from
| these]?
| INTERVIEWER: Enter amount in pounds.
| Range: 1..9999997
|
| END FILTER
|
| IF assets have not yet been shared out [QWill.EiBen = NotYet (4)]
|
| EIAMPROB @@
| Excluding any housing, pensions, or businesses [^deceased ELSA respondent's name] had, what
| was |the total value of these other assets?
| Range: 0..9999997
|
| END FILTER
|
| EILI
| Did [^deceased ELSA respondent's name] have any life insurance policies which paid out on [^his/her]
| death?
| 1 Yes
| 2 No

```

*IF had any life insurance [EiLI = Yes]*

**EILIWH**

**[Multiple responses to EILIWH are recorded in variables EILIWH01 to EILIWH23]**

SHOW CARD EI14

Who were the beneficiaries of the life insurance policies? CODE ALL THAT APPLY.

INTERVIEWER: Only code once for respondent. For example if respondent is son or daughter code 'Respondent', and not son or daughter. Only code 'Son' or 'Daughter' for those other than respondent.

- 01 Respondent (you)
- 02 Husband/Wife
- 03 Partner/cohabitee
- 04 Natural son/daughter
- 05 Adopted son/daughter
- 06 Foster son/daughter
- 07 Step-son/step-daughter/child of partner
- 08 Son-in-law/daughter-in-law
- 09 Natural parent
- 10 Adoptive parent
- 11 Foster parent
- 12 Step-parent/parent's partner
- 13 Parent-in-law
- 14 Natural brother/sister
- 15 Half-brother/sister
- 16 Step-brother/sister
- 17 Adopted brother/sister
- 18 Foster brother/sister
- 19 Brother-in-law/sister-in-law
- 20 Grandchild
- 21 Grandparent
- 22 Other relative (specify at next question)
- 23 Other non-relative (specify at next question)

*IF other relative was a beneficiary of insurance policy [EiLIWh=22]*

**EILIWR @**

INTERVIEWER: Please specify the other relative(s).

STRING 80

END FILTER

*IF other non-relative was a beneficiary of insurance policy [EiLIWh=23]*

**EILIWN @**

INTERVIEWER: Please specify the other non-relative(s).

STRING 80

END FILTER

**EILIA @** (see DVEILLA grouped for non-disclosure)

How much in total was the pay out from the life insurance?

Range: 1..9999997

LOOP FOR idx:= 1 TO 24

**EILIB**

*[Loop: Responses to EILIB are recorded in variables EILIB01 to EILIB24]*

How much did [^you\the type of relative] receive from these life insurance policies.

Range: 1..9999997

*IF no response to amount received [EiLlb[idx] = NONRESPONSE]*

**EiLlab**

Was it.....

BRACKETS (2000, 10000, 50000, 300000)

[Bracket results are recorded in EiLl11-24, EiLlu1-24, EiLle1-24, EiLlr1-24]

END FILTER

END FILTER

END FILTER

END FILTER

**EIENDA @**

We have asked you many questions about numerous aspects of [^deceased ELSA respondent's name]'s health and finances, and we want to thank you very much for your assistance with them. Is there anything else you would like to add about [^deceased ELSA respondent's name] in [^his/her] last year of life?

INTERVIEWER: If nothing to say, type None and press END.

STRING 500

**EIENDB @**

Thank you once again for all the information you have given us. It will prove extremely useful in helping us to understand how people fare at the end of their lives, and in forming policies which can help them.

Range: 1..1

# **HEALTH AND LIFESTYLES OF PEOPLE AGED 50 AND OVER**

**(ELSA - P2496)**

**SHOWCARDS**

# CARD A1

- 1 Husband/wife
- 2 Partner/cohabitee
- 3 Natural son/daughter
- 4 Adopted son/daughter
- 5 Foster son/daughter
- 6 Step son/daughter/child of partner
- 7 Son/daughter-in-law
- 8 Natural parent
- 9 Adoptive parent
- 10 Foster parent
- 11 Step parent/parent's partner
- 12 Parent-in-law
- 13 Natural brother/sister
- 14 Half-brother/sister
- 15 Step-brother/sister
- 16 Adopted brother/sister
- 17 Foster brother/sister
- 18 Brother/sister-in-law
- 19 Grandchild
- 20 Grandparent
- 21 Other relative
- 22 Other non-relative

## CARD B1

- 1 Single, that is never married
- 2 Married, first and only marriage
- 3 A civil partner in a legally-recognised  
Civil Partnership
- 4 Remarried, second or later marriage
- 5 Legally separated
- 6 Divorced
- 7 Widowed

## **CARD B2**

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

## **CARD C1**

- 1 No natural teeth and wear dentures
- 2 Both natural teeth and denture(s)
- 3 Only natural teeth
- 4 Neither natural teeth nor dentures

## CARD C2

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

## CARD C3

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

## CARD C4

Accupro	<b>Lisinopril</b>
Amias	<b>Lisinopril with Diuretic</b>
Aprovel	<b>Losartan Potassium</b>
<b>Candesartan Cilexetil</b>	<b>Losartan Potassium with Diuretic</b>
Capoten	Micardis
Capozide	Micardis Plus
<b>Captopril</b>	Odrik
Carace	<b>Perindopril Erbumine</b>
Carace Plus	<b>Quinapril Hydrochloride</b>
<b>Cilazapril</b>	<b>Ramipril</b>
CoAprovel	<b>Ramipril with Calcium Channel Blocker</b>
Coversyl	Staril
Cozaar	Tanatril
Cozaar-Comp	Tarka
<b>Co-Zidocapt (Hydchloroth/Captopril)</b>	<b>Telmisartan</b>
Diovan	<b>Telmisartan with Diuretic</b>
<b>Enalapril Maleate</b>	Teveten
<b>Enalapril maleate with Diuretic</b>	<b>Trandolapril</b>
<b>Eprosartan</b>	<b>Trandolapril + Calcium Channel Blocker</b>
<b>Fosinopril Sodium</b>	Triapin
Gopten	Tritace
<b>Imidapril Hydrochloride</b>	<b>Valsartan</b>
Innovace	Vascace
Innozide	Zestoretic
<b>Irbesartan</b>	Zestril
<b>Irbesartan with Diuretic</b>	

## CARD C5

- 1 Just about everything you need to know
- 2 Most of what you need to know
- 3 Some of what you need to know
- 4 A little of what you need to know
- 5 Almost none of what you need to know

## CARD C6

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

## **CARD C7**

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

## **CARD C8**

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

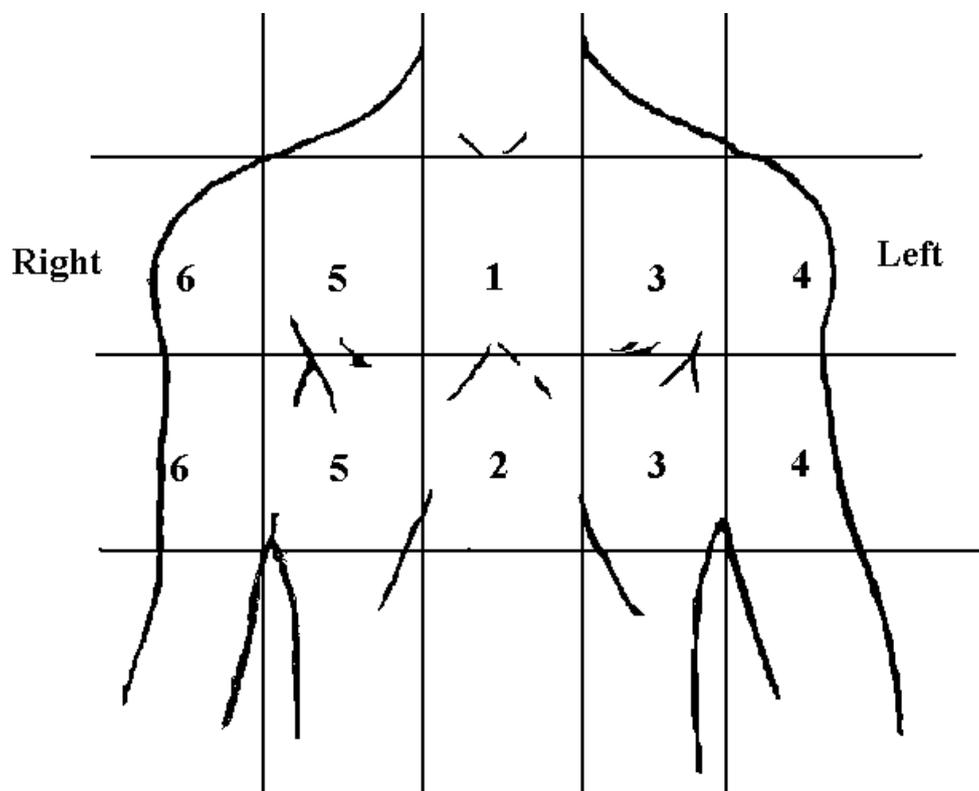
## **CARD C9**

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

## **CARD C10**

- 1 Back
- 2 Hips
- 3 Knees
- 4 Feet
- 5 Mouth/teeth
- 6 Other parts of the body
- 7 All over

# CARD C11



## CARD C12

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

## CARD C13

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

**CARD C14**

- 1 Husband or wife or partner
- 2 Mother or father
- 3 Son
- 4 Son-in-law
- 5 Daughter
- 6 Daughter-in-law
- 7 Sister
- 8 Brother
- 9 Grandson
- 10 Granddaughter
- 11 Other relative
- 12 Home help or care arranged by social services
- 13 Home help or care arranged privately
- 14 Nurse, eg. district nurse or health visitor
- 15 Someone else from the health or social services
- 16 Someone from a voluntary organisation (e.g. Age Concern)
- 17 Friend or neighbour
- 95 Other person
- 96 Do not get any help

## CARD C15

- 1 Occupational therapist or physiotherapist
- 2 Chiropodist
- 3 Exercise classes run by the local authority
- 4 Exercise classes run by a voluntary organisation
- 95 Other (please say what)
- 96 None of these

## **CARD C16**

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less

## CARD C17

- 1 Doctor or nurse said I should stop
- 2 It is unhealthy
- 3 It is expensive / to save money
- 4 Pressure from family or friends
- 5 Worried about effect of passive smoke  
on people around me
- 6 Stopped enjoying it
- 7 Cosmetic reasons (e.g. smell, stained  
teeth, fingers, hair)
- 8 It's becoming harder to smoke in  
public or at work
- 9 Advertising
- 95 Other (please say what)

## CARD C18

### **Vigorous**

*For example:*

Running or jogging

Swimming

Cycling

Aerobics or gym workout

Tennis

Digging with a spade or shovel

### **Moderate**

*For example:*

Gardening

Cleaning the car

Walking at a moderate pace

Dancing

Floor or stretching exercises

### **Mild**

*For example:*

Vacuuming

Laundry

Home repairs

## **CARD D1**

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less
- 6 Never

## CARD D2

- 1 No public transport available
- 2 Public transport available does not take me  
where I want to go
- 3 Too expensive
- 4 Unreliable
- 5 Infrequent
- 6 My health prevents me
- 7 Do not need to
- 8 Fear of crime
- 9 Too dirty
- 10 Not convenient
- 11 Prefer to walk
- 95 Other (Please say what)

## CARD D3

- 1 Lifts from family or friends who do not live with you
  - 2 Taxi
  - 3 Door-to-door community transport, e.g. dial-a-ride
  - 4 Transport provided by hospital / day centre / lunch club
- 96 None of these

## **CARD D4**

- 1 Every day or nearly every day
- 2 Two or three times a week
- 3 Once a week
- 4 Two or three times a month
- 5 Once a month or less

## **CARD E1**

- 1 Paid work
- 2 Self-employment
- 3 Voluntary Work
- 4 Cared for someone
- 5 Looked after home or family
- 6 Attended a formal educational or training course
- 96 None of these

## CARD E2

- 1 Retired
- 2 Employed
- 3 Self employed
- 4 Unemployed
- 5 Permanently sick or disabled
- 6 Looking after home or family
- 95 Other (please say what)

## CARD E3

- 1 Own ill health or disability
- 2 Job was too tiring/stressful
- 3 Ill health or disability of a relative/friend
- 4 Company went out of business/site closed down
- 5 Made redundant/dismissed/had no choice
- 6 Took voluntary redundancy
- 7 To spend more time with partner/family
- 8 Career progression
- 9 Fed up with job and wanted a change
- 10 Moved to a different area
- 95 Other reason

## **CARD E4**

- 1 Less physically demanding
  - 2 Less mentally demanding/stressful
  - 3 Fewer hours/job sharing
  - 4 More flexible hours
  - 5 Working from home sometimes
  - 6 Special equipment/workplace adaptation
- 95 None of these

## **CARD E5**

- 1 Sedentary occupation:**  
You spend most of your time sitting
  
- 2 Standing occupation:**  
You spend most of your time standing or walking. However the way you spend your time does not require intense physical effort
  
- 3 Physical work:**  
This involves some physical effort including handling of heavy objects and use of tools
  
- 4 Heavy manual work:**  
This involves very vigorous physical activity including handling of very heavy

## CARD E6

- 1 Own ill health or disability
- 2 Working was too tiring/stressful
- 3 Ill health or disability of a relative/friend
- 4 Company went out of business/site closed down
- 5 Made redundant/dismissed/had no choice
- 6 Took voluntary redundancy
- 7 Could not find another job
- 8 Could afford to stop working
- 9 To spend more time with partner/family
- 10 To enjoy life while still fit and young enough
- 11 Fed up with working and wanted a change
- 12 To stop working at same time as husband/wife/partner
- 13 To give young generation a chance
- 14 Moved to a different area
- 95 Other reason

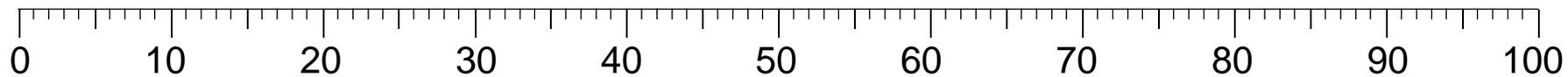
## **CARD E7**

- 1 Own ill health or disability
- 2 Job too tiring/stressful
- 3 Ill health or disability of a relative/friend
- 4 Company going out of business/site closing down
- 5 Being made redundant/dismissed/ have no choice
- 6 Taking voluntary redundancy
- 7 To spend more time with partner/family
- 8 Fed up with job and want a change
- 9 Fed up with employer/colleagues and want a change
- 10 To progress my career
- 11 To earn more money
- 12 Moving to a different area
- 95 Other reason

## CARD E8

- 1 Less physically demanding
- 2 Less mentally demanding/stressful
- 3 Fewer hours/job sharing
- 4 More flexible hours
- 5 Working from home sometimes
- 6 Special equipment/workplace  
adaptation
- 95 Other change
- 96 None of these

# CARD E9



Absolutely  
No Chance

Absolutely  
Certain

## **CARD E10**

- 1 A lot lower than expected
- 2 A little lower than expected
- 3 About what expected
- 4 A little higher than expected
- 5 A lot higher than expected
- 6 Hadn't thought about it before

## CARD E11

- 1 Own ill health
- 2 Ill health of a relative/friend
- 3 Made redundant/dismissed/had no choice
- 4 Offered reasonable financial terms to retire early or take voluntary redundancy
- 5 Could not find another job
- 6 To spend more time with partner/ family
- 7 To enjoy life while still young and fit enough
- 8 Fed up with job and wanted a change
- 9 To retire at the same time as husband/wife/partner
- 10 To retire at a different time to husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (please say what)
- 96 None of these

## CARD E12

- 1 Reached retirement age
- 2 Own ill health
- 3 Ill health of a relative/friend
- 4 Made redundant/dismissed/had no choice
- 5 Could not find another job
- 6 To spend more time with partner/ family
- 7 To enjoy life while still young and fit  
enough
- 8 Fed up with job and wanted a change
- 9 To retire at the same time as  
husband/wife/partner
- 10 To retire at a different time to  
husband/wife/partner
- 11 To give the young generation a chance
- 95 Other (please say what)
- 96 None of these

## **CARD E13**

### **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

### **Type B:**

My pension will be based on a formula involving age, years of service and salary

Don't know

## CARD E14

- 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

## CARD F1

- 1 Incapacity Benefit (previously Invalidity Benefit)
- 2 Severe Disablement Allowance (SDA)
- 3 Statutory sick pay (SSP)
- 4 Attendance Allowance
- 5 Disability Living Allowance
- 6 Industrial Injuries Disablement Benefit
- 7 War Disablement Pension or War Widow's Pension
- 8 Carer's Allowance
- 95 Some other benefit for people with disabilities (please say what)
- 96 None of these

## CARD F2

- 1 Income Support
- 2 Pension Credit (income support for the over 60s, replaced Minimum Income Guarantee in October 2003)
- 3 Working Tax Credit (formerly part of Working Families Tax Credit)
- 4 Job-seeker's Allowance (formerly Unemployment Benefit)
- 5 Guardian's Allowance
- 6 Widow's pension/Widowed mother's allowance/Widowed Parent's allowance/Bereavement allowance
- 7 Child Benefit
- 8 Child Tax Credit
- 95 Some other state benefit (please say what)
- 96 None of these

## CARD F3

- 1 Current Account at a bank, building society or elsewhere
- 2 Savings Account at a bank, building society or elsewhere
- 3 TESSA
- 4 ISA
- 5 Premium Bonds
- 6 National Savings Accounts or Certificates
- 7 PEP
- 8 Stocks and/or Shares
- 9 Share Options/Employee share ownership
- 10 Share clubs
- 11 Unit or Investment Trusts
- 12 Bonds and Gilts (government or corporate)
- 95 Other savings or investments
- 96 None of these

## CARD F4

- 1 Houses, flats or holiday homes, including time shares (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

## CARD F5

- 1 Life insurance policy
- 2 Lump sum pension payout
- 3 Personal Accident plan
- 4 Other Insurance Payment
- 5 Redundancy payment
- 6 Inheritance or bequest (inc. inherited property)
- 7 Win(s) on the football pools, national lottery or other form of gambling
- 95 Other payment (please say what)
- 96 None of these

## CARD F6

- 1 Hire purchase agreements
  - 2 Personal loans (from bank, building society or other financial institution)
  - 3 Overdraft
  - 4 Catalogue or mail order purchase agreements
  - 5 DWP Social fund loan
  - 6 Loan from a money lender or `tally man`
- 96 None of these

## **CARD F7**

- 1 Manage very well
- 2 Manage quite well
- 3 Get by alright
- 4 Don't manage very well
- 5 Have some financial difficulties
- 6 Have severe financial difficulties

## CARD F8

- 1 I look after all the household money except my partner's personal spending money
- 2 household money except my personal spending money
- 3 I am given a housekeeping allowance. My partner looks after the rest of the money
- 4 My partner is given a housekeeping allowance. I look after the rest of the money
- 5 We share and manage our household finances jointly
- 6 We keep our finances completely separate
  
- 95 Some other arrangement

## CARD G1

- 1 Own it outright
- 2 Buying it with the help of a mortgage or loan
- 3 Pay part rent and part mortgage (shared ownership)
- 4 Rent it
- 5 Live here rent free (including rent free in relative's/friend's property; excluding squatting)
- 6 Squatting

## **CARD G2**

- 1 Local authority or council
  - 2 Housing association or co-operative or charitable trust
  - 3 Individual private landlord
  - 4 Employer of a household member
  - 5 Relative/friend of a household member
- 95 Another organisation / individual

**CARD G3**

- 1 Water charges
- 2 Sewerage charges
- 3 Land or business premises
- 4 Separate Garage
- 5 Heating or lighting or hot water
- 6 Council Tax
- 96 None of these

## CARD G4

- 1 Meals
- 2 Gardening
- 3 Cleaning
- 4 Warden or porter
- 5 Security service/guard
- 95 Other services (please say what)
- 96 None of these

## **CARD G5**

- 1 A repayment mortgage or loan (where your mortgage payments cover interest and part of the original loan)
- 2 An endowment mortgage (where your mortgage payments cover interest only and you save separately to pay off the capital)
- 3 Part repayment and part endowment
- 4 A pension mortgage (where your mortgage payments cover interest only)
- 5 A PEP, ISA or Unit Trust mortgage
- 95 Another type of mortgage or loan

## **CARD G6**

- 1 Private Owner
- 2 Council or Local Authority
- 3 Housing Association
- 4 Landlord
- 5 Family or relative
- 96 None of these

## **CARD G7**

- 1 Widened doorways or hallways
- 2 Ramps or street level entrances
- 3 Hand rails
- 4 Automatic or easy open doors
- 5 Accessible parking or drop off site
- 6 Bathroom modifications
- 7 Kitchen modifications
- 8 Lift
- 9 Chair lift or stair glide
- 10 Alerting devices, such as button alarms
- 95 Any other special features
- 96 None of these

## CARD G8

- 1 Shortage of space
- 2 Noise from neighbours
- 3 Other street noise, such as traffic, businesses, factories
- 4 Too dark, not enough light
- 5 Pollution, grime or other environmental problems caused by traffic or industry
- 6 Rising damp in floors and walls
- 7 Water getting in from roof, gutters or windows
- 8 Bad condensation problem
- 9 Problems with electrical wiring or plumbing
- 10 General rot and decay
- 11 Problems with insects, mice or rats
- 12 Too cold in winter
- 95 Other problems (please say what)
- 96 None of these

## CARD G9

- 1 Television
- 2 Video recorder
- 3 CD player
- 4 Deep freeze or fridge freezer (exclude fridge only)
- 5 Washing machine
- 6 Tumble Drier/Washer - Dryer
- 7 Dishwasher
- 8 Microwave oven
- 9 Computer
- 10 On-line-digital/Satellite/Cable Television
- 11 Phone (landline)
- 12 DVD player
- 95 All of these
- 96 None of these

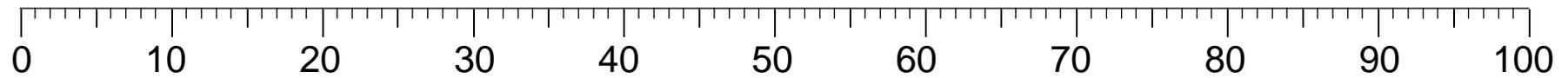
**CARD G10**

- 1 Mains gas
- 2 Electricity
- 3 Coal/Smokeless fuel
- 4 Paraffin/Bottled gas
- 5 Oil
- 6 Wood
- 95 Other source of fuel or power

## **CARD G11**

- 1 Direct debit
  - 2 Monthly/quarterly bill (including standing orders)
  - 3 Pre-payment (key/card or token) meters
  - 4 Included in rent
  - 5 Frequent cash payment (i.e. more frequent than once a month)
  - 6 Fuel direct/direct from benefits
  - 7 Staywarm scheme
- 95 Other

# CARD H1



Absolutely  
No Chance

Absolutely  
Certain

## **CARD H2**

1 Never

2 Rarely

3 Sometimes

4 Often

5 Most of the time

## **CARD H3**

- 1 Much worse off
- 2 A bit worse off
- 3 About the same
- 4 A bit better off
- 5 Much better off

## CARD H4

- 1 Buy your first choices of food items
- 2 Have family and friends round for a drink or meal
- 3 Have an outfit to wear for social or family occasions
- 4 Keep your home in a reasonable state of decoration
- 5 Replace or repair broken electrical goods
- 6 Pay for fares or other transport costs to get to and from places you want to go
- 7 Buy presents for friends or family once a year
- 8 Take the sorts of holidays you want
- 9 Treat yourself from time to time
- 96 None of these

## CARD I1

- 1 To meet other people
- 2 To contribute something useful
- 3 For personal achievement
- 4 Because I am needed
- 5 To earn money
- 6 Because I enjoy it
- 7 To use my skills
- 8 To keep fit
- 9 Because I feel obliged to do it
- 96 None of these

## **CARD I2**

1 Strongly agree

2 Agree

3 Disagree

4 Strongly disagree

## CARD J1

- 1 White
- 2 Mixed ethnic group
- 3 Black
- 4 Black British
- 5 Asian
- 6 Asian British
- 95 Any other group

# CARD J2

- 1 Degree/degree level qualification (including higher degree)
- 2 Teaching qualification
- 3 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
- 4 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTTECH Higher
- 5 ONC/OND/BEC/TEC/BTEC not higher
- 6 City and Guilds Full Technological Certificate
- 7 City and Guilds Advanced/Final Level
- 8 City and Guilds Craft/Ordinary Level
- 9 A-levels/Higher School Certificate
- 10 AS level
- 11 SLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies
- 12 O-level passes taken in 1975 or earlier
- 13 O-level passes taken after 1975 GRADES A-C
- 14 O-level passes taken after 1975 GRADES D-E
- 15 GCSE GRADES A-C
- 16 GCSE GRADES D-G
- 17 CSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3
- 18 CSE GRADES 2-5/SCE Ordinary BANDS D-E
- 19 CSE Ungraded
- 20 SLC Lower
- 21 SUPE Lower or Ordinary
- 22 School Certificate or Matriculation
- 23 NVQ Level 5
- 24 NVQ Level 4
- 25 NVQ Level 3/Advanced level GNVQ
- 26 NVQ Level 2/Intermediate level GNVQ
- 27 NVQ Level 1/Foundation level GNVQ
- 28 Recognised Trade Apprenticeship completed
- 29 Clerical or Commercial Qualification (eg typing/book-keeping/commerce)
- 95 Other qualifications (please say what)

**HEALTH AND LIFESTYLES OF PEOPLE  
AGED 50 AND OVER  
(ELSA)**

**P2496  
ELSA WAVE 3**

**PROJECT INSTRUCTIONS**

ELSA W3 /April 2006

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# 1. ABOUT THE STUDY

## 1.1 Background and introduction to the study

The English Longitudinal Study of Ageing (ELSA) is a study of people aged 50 and over and their partners. The aim is to interview the same group of people every two years to explore **the health, lifestyles and financial situation** of people as they grow older. The field name of the study is 'health and lifestyles of people aged 50 and over'.

Over time, the study will allow us to explore many questions, for example:

- How does people's health and level of disability change over time?
- What explains who has good health in later life and who does not?
- When do people retire and how do they plan for their retirement?
- Do people have enough savings to provide for their older age?
- How do people's activities, relationships and quality of life change over time?
- How do changes in memory and concentration affect well being?
- What is the relationship between these different factors?

ELSA is modelled on a similar study in the US (the Health and Retirement Study, HRS). A parallel study, the Survey of Health, Ageing and Retirement in Europe (SHARE), has completed its first wave of data collection across Europe and is due to start its second wave shortly. Equivalent studies are being developed in many other countries of the world, most recently Korea. A team of researchers on the Korean Longitudinal Study of Ageing (KLOSA) came to visit us in March 2006 to find out about ELSA and to share their experiences of setting up KLOSA, which is due to go into field this year. The various longitudinal studies of ageing being carried out across the world will be used to compare experiences across countries and understand how national policies and contexts effect people's lives.

Originally we were funded for two waves of data collection for ELSA: the Wave 1 survey held in 2002-2003 (interview only) and the Wave 2 survey in 2004-2005 (interview and nurse visit). We have now been awarded funding for two further waves: Wave 3 which begins in May 2006 (it involves an interview and a retrospective interview which is described in Section 9); and Wave 4 which will begin in 2008 (interview and nurse visit). We hope to continue to revisit respondents at least every two years so that we can learn how people's lives change over time.

Half of the funding for ELSA has been provided by the US National Institute on Aging which also funds the Health and Retirement Study mentioned earlier. The remaining funding for the study has been provided by a consortium of UK government departments.

The study is being carried out by a collaboration between NatCen, the Department of Epidemiology and Public Health at University College London (UCL), the Institute for Fiscal Studies (IFS) and academics from Cambridge University, University of East Anglia, Exeter University and other universities. The principal investigator in the research team is Professor Sir Michael Marmot, Head of the Department of Epidemiology and Public Health and Director of the International Centre for Health and Society, UCL.

We plan to publish a report of the findings from Wave 2 in July 2006, when we will also invite the press, academics and government officials to a public launch.

## 1.2 Overview of study procedures

The study procedures are set out in greater detail in the remaining sections of these instructions. In brief, the process you should follow is:

- (a) Notify the local **police** station(s) before you start work.
- (b) Send out the **advance letters**. Look at the coversheet to find out whether you should enclose a **newsletter or coversheet** with the letter.
- (c) Look at the information label to find out if you should contact the respondent **by phone or face-to-face**.
- (d) Contact all the individuals on the information label and tailor your approach to consider the following:
  - whether they are an original or refreshment sample member
  - what the outcomes were for previous interviews (look on coversheet)
- (e) If a respondent refuses to be interviewed, record any reasons for refusal at section of the ARF
- (f) Conduct the household demographics module to clarify who is eligible for interview in the household.
- (g) Where a sample member no longer lives in a household, or the entire household has moved, do your best to trace them. **If the household has split**, open up a new household slot in the CAPI and an ARF B. Please remember to give an outcome code even if the household is unproductive.
- (h) **If a respondent has died**, please try to find someone appropriate to do an End of Life interview. Record the details at Section D of the ARF and open an End of Life Record Form (ERF).
- (i) **If a respondent has moved into an institution such as a nursing or residential home**, record details at Section C of the ARF. Attempt to find out if the respondent would be able to answer the questions themselves. If they are not able try to find someone to do a proxy institution interview instead.
- (j) **Carry out a proxy interview** if a sample member cannot be interviewed in person because of a physical or cognitive impairment, or because they are away in hospital or temporary care throughout the whole fieldwork period. Please do not conduct a proxy interview for reasons like refusal, working away from home, or inadequate spoken English.
- (k) Wherever appropriate, conduct the elements of the survey with all eligible individuals, following the procedures set out in these instructions.
- (l) **Issue a core self-completion questionnaire (BLUE) to all respondents interviewed in person** (i.e. not proxies) and return completed questionnaires to the Yellow Team at Brentwood. If conducting a non-concurrent interview, please leave the core self-completion questionnaire with the respondent so that they can return it to us directly.
- (m) Check the information leaflet (or coversheet) to find out whether the respondent is also required to do one of the **additional questionnaires – yellow or green**. Although, please do not ask proxy informants to complete these. Please leave this questionnaire behind with the respondent to complete and return to us.
- (n) Ask the respondent if they are willing to do the **Retrospective Interview**. If you do not have the retrospective programme yet, tell the respondent you will contact them in the near future to arrange the interview. If you have the retrospective programme, arrange a time to do the interview.

- (o) Give the respondent **the £10 cheque** at the end of the interview. If you feel that you would like to give the respondent a **special 'thank you'** for taking part (e.g. if the interview was particularly long) then you can buy them a thank you card or gift costing up to £10 (e.g. flowers). Please check with the yellow team before you buy the gift and claim it back on expenses.

## **2. ELSA WAVE 3 SAMPLE**

### **2.1 Original sample**

The original sample for ELSA was selected from households that participated in the Health Survey for England (HSE). The HSE years selected for the original ELSA sample were 1998, 1999 and 2001. The majority of our sample were first interviewed as part of the HSE in one of these years. Most were then interviewed a second time at ELSA Wave 1. Wave 1 is considered to be the baseline for ELSA. Therefore, at Wave 2 we only followed up people who were in productive households at Wave 1. This meant that at Wave 2 each issued household had had at least one productive interview at Wave 1. However, at Wave 3, we are issuing some households that were unproductive at Wave 2. We hope that you will be able to carry out interviews with some of the eligible individuals in these households.

Most of the respondents from the original sample issued at Wave 3 will have had a Wave 1 interview and had an interview and a nurse visit at Wave 2. There will have been a gap of approximately two years since we last interviewed them. However, some sample members may have missed one or more of these interviews. And some sample members have become eligible by moving into an ELSA household since the time of the HSE interview and so may have joined the study later than others. Please keep this in mind when you approach each household. This means it may have been 4 or more years since they were last interviewed.

From our original sample we are issuing a total of 10768 eligible people for Wave 3 who are living in 6917 households.

#### ***Refusers***

With ELSA entering its third wave, we need to develop a strategy to help us keep as many respondents in the study as possible and to interview as many as we can at each wave. As mentioned above, at Wave 3 we will be issuing all those respondents who were eligible for Wave 2, meaning that some refusing households at Wave 2 will be issued as well. So at Wave 3 there will be some issued households in which all the eligible members refused at Wave 2, and there will be others which contain a mix of productives and refusers at Wave 2.

We have tried to categorise Wave 2 refusers as either soft refusers (people who refused to take part at a particular time, but could be reissued later) and hard refusers (people who want to be removed from the ELSA sample). We have only issued soft refusers at Wave 3. A different advance letter has been produced for refusers for you to send out.

### **2.2 Refreshment (new) sample**

The aim of ELSA is to study a sample of people aged 50 and over. However, as the study progresses, all the respondents get older, so we need to replace the youngest people as they are no longer represented. In order that our sample continues to include the full range of age groups, we have sampled new people from HSE 2001, 2002, 2003 and 2004 who were previously too young to join ELSA in 2002, but are now aged 50 or over (i.e. people aged 50 to 53 and their older/younger partners).

Households from these HSE survey years were selected for the study if at least one HSE interview was conducted with an eligible respondent in the household and they

agreed to be recontacted. This provides a total of 1648 additional households which have been added to the sample (2847 eligible individuals). The aim now is to invite them to join ELSA to take part in all future waves. You will need to approach them in a different way to our original sample members because they have no prior knowledge of ELSA (See section 4.3).

In comparison to our original sample, there is a greater chance that some households selected as part of our refreshment sample will have moved, as some will not have been contacted by us since 2001. Please see mover and tracing section for guidelines on how to deal with households that have moved address (Sections 4.6).

## **2.3 Eligibility for ELSA**

### ***Original sample***

There are three different types of respondents in the original sample who are eligible to take part in the study:

#### Core Member (CM)

- Someone born on or before 29<sup>th</sup> February 1952 who was living within a household which took part in HSE 1998, 1999 or 2001 at the time of the HSE interview and was still living in the household sector within England when they were visited at Wave 1.

#### Young Partner (YP)

- A cohabiting spouse or cohabiting partner of a Core Member who was living within a household which took part in HSE 1998, 1999 or 2001 at the time of the HSE interview. All Young Partners were born AFTER 29<sup>th</sup> February 1952.

#### New Partner (NP)

- A cohabiting spouse or cohabiting partner of a sample member (who was not living in the household at HSE). At each wave we pick up new partners, who have joined the household since the last visit. New partners identified at Wave 1 are called NP1s, new partners identified at Wave 2 are called NP2s, and any new partners you find at Wave 3 will be classified as NP3s. All the new partners will be dealt with in the same way by the CAPI.

People are only eligible for interview if they are a core member or the cohabiting spouse or cohabiting partner of a core member, regardless of their age. However, if a household splits, all Sample Members, Younger Partners and New Partners should be traced (see Section 4.6 for more information). The household grid works out who is eligible for interview for you.

### ***Refreshment sample***

We have identified people from HSE who could potentially become core members, or their younger or older partners. You may also find new partners who are eligible when you contact the household.

Potential Core Member:

- Someone aged between 50 and 53 at 1<sup>st</sup> March 2006 who was living within a household which took part in HSE 2001-2004 and one member of the household agreed to be re-interviewed.
- **Unlike the original sample, they must still be living in a household sector in England at the time of ELSA Wave 3 interview.**

Potential Young/Old partner:

- A cohabiting spouse or cohabiting partner of a Core Member aged under 50 or over 53 at 1<sup>st</sup> March 2006 who was living within a household which took part in HSE 2001-2004 at the time of the HSE interview.
- **Young and Old Partners are only eligible for the study if they are still the cohabiting spouse or cohabiting partner of a sample member at the time you interview them.**

As with the original sample, new partners living with core members in the refreshment sample will also be eligible to take part.

## **2.4 Contact with sample since Wave 2**

We sent a Christmas card to all ELSA respondents in the original sample last year.

In July 2005, we held two meetings with two small groups (around 8 people) of ELSA respondents, one in London and one in Leeds. In these meetings we asked respondents about their experiences and views of the study. We got lots of positive feedback from these meetings (see Box 1 on next page). We hope to hold similar meetings with ELSA respondents in the future to help us improve the study.

In March 2006, each original sample member interviewed at Wave 2 was sent a pre-advance letter asking them to update us in the event of any change in their circumstances (e.g. if they had moved address). We updated our sample records with this information before issuing the addresses to you.

## **BOX 1: FINDINGS FROM THE ELSA PARTICIPANTS MEETINGS**

### **Reasons for participating in the survey**

- “Interesting, and something new. I’ll try anything once.”
- “Here is my opportunity to do something positive...to improve things in the future for elderly”
- “It’s to help other people”
- “Somebody was interested in me and she cared”

### **Positive feedback about our interviewers:**

- “The guy knew what he was talking about...his questions were very clear, not ambiguous”
- “Very charming”
- “Very nice and you weren’t put under any pressure.”
- “They were so efficient”
- “They weren’t like salesmen coming round and selling you things, you know... And they were so homely, and they just talked to you.”

### **Views about who was doing the study and why:**

- “It sounded all very above board and official and trustworthy”
- “No insurance company behind it”
- “It felt more academic than political”
- “Everything was explained very efficiently so you knew exactly what you were getting into.”

### **Views about taking part in a longterm project:**

- “I wanted to prove them wrong too, we’re not getting older.”
- “Somebody is keeping an eye on you”

### 3. FIELDWORK MATERIALS

The documents are included in your work packs

Document	Section to look at in instructions
1. Police letter	4.1
2. Advance letters for each eligible individual (that we know of), 3 possible types:  <ul style="list-style-type: none"> <li>• Original sample</li> <li>• Refreshment sample</li> <li>• Refusers</li> </ul>	4.3
3. Information leaflet	4.3
4. Update Newsletter	4.3
5. ARF A for each household, 2 possible types:  <ul style="list-style-type: none"> <li>• Original sample (peach)</li> <li>• Refreshment sample (blue)</li> </ul>	4.5
6. ARF B, for split households (lilac)	4.6
7. Coversheet for each household	4.5
8. Appointment card	
9. Postcard for broken appointments	
10. Mover letter (including new address info sheet, and a small and large envelopes) for tracing	4.6
11. Timed walk card	6.3 & Appendix B
12. Cognitive function booklet	6.8 & Appendix C
13. Consent form (HES & NI) (yellow)	6.10
14. Consent form (NHSCR) (pink)	6.10
15. Core self-completion (blue)	7
16. Health self-completion (green)	7
17. Work self-completion (yellow)	7
18. Thank you letter and cheque	4.9
19. ERF – End of Life Interview Address Record Form, if a respondent has died	8.6
20. Showcards	

#### **Other materials**

You will also need the following equipment for the timed walk (MM) and cognitive function (CF) modules:

- (1) A pencil
- (2) Your clipboard
- (3) Stopwatch and
- (4) Tape measure with mark to identify correct distance for timed walk

## 4. FIELDWORK PROCEDURES

### 4.1 Police letters

As always, **notify the local police station(s) before you start work**. Please tell them what the survey is about, give them a copy of the advance letter, and explain how long you will be working in the area. Then present your identity card and leave your name and home telephone number. Ensure that all the details you have given are recorded in the day-book at the station desk if that station has one. Make a note of the name of the officer to whom you speak and the date of your call so that you are fully covered in the event of any query or complaint to the police. It is reassuring for suspicious sample members, as well as other people you come into contact with, to be told that the police know about you. **You must not start work until you have registered with the police.**

### 4.2 Fieldwork timetable and assignments

The number of addresses issued to you will be between 1 and 40. There may be a mix of original and refreshment addresses within a point. All addresses will be issued in two batches: the first in May and the second in September. The batch a household is assigned to will depend on the date of their last interview and their geographical location. Where possible we have tried to allocate households from the original sample to the interviewer who conducted the previous ELSA interview(s) at that household.

Please start work as soon as possible. Fieldwork will be monitored on a weekly basis. You will be asked to work steadily each week and you will be given guidelines about the percentage of work that should be completed after 1<sup>st</sup> month etc. Please also remember to transmit your work regularly during the fieldwork period.

### 4.3 Advance letters

You will need to send out your own advance letters. There are three versions of the advance letter. The coversheet tells you which version of the letter to send and whether you should enclose a newsletter or leaflet with it. The three types of advance letters are:

#### Original sample members

A letter has been provided for those respondents who were interviewed during Wave 2 and who did not explicitly refuse to be recontacted in the future.

#### Refreshment (New) sample

A letter has been provided for members of the refreshment sample who were interviewed in HSE 2001, 2002, 2003 or 2004. These letters have 'New' written on the top left hand corner.

#### Refusers

We have produced an advanced letter for people who refused at Wave 2. These letters have 'Ref' written on the top left hand corner. You should post these out like the other advance letters. In the pilots for Wave 3 interviewers chose not to emphasise that a given individual had refused at a previous wave. They found that some respondents

had forgotten they refused last time, and in one case another household member encouraged them to take part this time.

We have also provided you with a laminated copy of each of the three types of advance letters. The original and refreshment ('New') letters are printed back to back, whilst the refreshment ('Ref') letter is on it's own.

Please note that we have **not** provided you with advance letters for people who we know to be in an institution. Please see Section 5.6 to find out how to contact these respondents.

***ELSA leaflet***

We have produced a leaflet similar to the ones used in previous waves. The leaflet should either be sent with the advance letter or given to the respondent on the doorstep or at the end of the interview (see Table below). We want you to send the leaflet with the advance letter to the refreshment sample and refusers, as they may not know much about ELSA. However, we want all households to have a copy of the leaflet, so please make sure that you give a leaflet to the original sample households before you leave.

***ELSA Newsletter***

The newsletter contains some recent findings from ELSA and some news about the study. We would like you to send it with the advance letter to the original sample, as we hope that it will encourage them to take part again (see Table below). You may want to use it on the doorstep with the refreshment sample or refusers in order to persuade those respondents about the value of the study. Again, all households should be left with a copy of the newsletter so please make sure that you give one to the refreshment sample households and refusers before you leave.

Type of advance letter	What to post with advance letter	What to give respondent on doorstep or at end of interview
Original sample	Newsletter	Leaflet
Refreshment ('new') sample	Leaflet	Newsletter
Refuser ('ref')	Leaflet	Newsletter

**4.4 Initial contact with respondents**

Since ELSA began, many of you have built up a good rapport with our respondents, and feel you know them well. As a result, feedback from the pilots for Wave 3 was that often a telephone call in advance to arrange a time to visit would be enough to secure the interview. Therefore, we would like **you to make the initial contact by telephone with some pre-selected cases** who were interviewed at both waves of ELSA and are under 80. It is felt that respondents who agreed to both ELSA interviews are less likely to refuse at Wave 3 and are therefore the best candidates for this method. The information label will tell you what your initial approach should be, i.e. telephone or face to face (see Information Label below).

Please use our suggested approach for contacting each respondent when possible. However, if you feel that the approach we have suggested would not be appropriate for a particular case (for example, if we have suggested you telephone a respondent who

is specified as having hearing problems on the coversheet), then please contact them using the other approach. However, if we have suggested face-to-face contact, please do not contact the respondent by phone for the initial contact unless you have a good reason to do so. Please discuss this with your project manager.

Two individuals in the same household may have different methods of contact suggested on the information label (e.g if one individual took part at both waves of ELSA but the second person refused at one wave). In these instances you should contact the household by telephone first and ask to speak to the person who we have suggested you can contact by telephone. Once you've arranged an appointment with this individual you should ask them if they think the other eligible sample member in the household would be willing to be interviewed. If the answer is no, you could attempt to contact the individual in person to persuade them to participate if appropriate.

We have printed respondents' email addresses on the coversheet if they have one, however please do not contact respondents by email.

When you visit respondents, please be meticulous about showing your ID card to them, even if the people you speak to do not appear to be interested in it. Please also remember to avoid giving away information about the study to neighbours in your attempts to find respondents at home.

### ***Introducing the study***

"ELSA" has been written on all the materials we give respondents and they will hopefully have come to recognise this name by now. But it may still be sensible, especially for the refreshment sample, to use the field name, i.e. say it is an interview about the health and lifestyles of people aged fifty and over. However, please do mention "ELSA" during the course of your visit and try to encourage people to see themselves as part of ELSA, an ongoing study which will be important in the future.

## **4.5 Address Record Form**

The main ARF has been printed on two different colours. The peach ARF is for households in the original sample, and the blue ARF is for those in the refreshment sample. You also have an ARF B (lilac) to use if a household has split.

There are two labels on the front of each ARF:

Address Label

The address label has the following information:

S: **130460311 T**      P: 101    FA: 0  
Address 1  
Address 2  
Address 3  
Address 4  
Address 5  
Post code  
T: 020 8898 7907

**Key:**

**S** = Serial number and check letter. The household serial number is 9 digits long (the individual serial number is 11 digits – 9 digits from the household serial number and 2 digits for the person number)

**P** = Point number

**FA** = Field area

**T** = telephone number

**Information label**

There is one information label per address. Examples of two different types of information label are shown below. We have shown only those people in the household who are eligible for the ELSA study, alongside their person numbers (used in the CAPI household grid).

S: 130460311 T R: Orig

**Pno – Name – Age – Contact - SelfComp**

01 - Thomas Macintosh - 76 - Tel - Ye

02 - Ruby Johnson - 69 - Tel - Gr

- - - -

- - - -

S: 130460311 T R: Orig

**Pno – Name – Age – Contact - SelfComp**

01 – Sally Peters - 73 – F2F - Bl

- - - -

- - - -

- - - -

**Key:**

**S** = Serial number and check letter.

**R** = Whether in refreshment or original sample:

Orig: Original sample

Refresh: Refreshment sample

**Pno** = Person number (used in the CAPI household grid)

**Contact** = Method of initial contact (see Section 4.4):

F2F: Face to face contact

Tel: Telephone contact

**SelfComp** = Colour of self-completion questionnaire(s) respondent will need

Gr: Health self-completion (Green) + Core self-completion (Blue)

Ye: Work self-completion (Yellow) + Core self-completion (Blue)

Bl: Core self-completion (Blue) only

**Coversheet**

We have created a coversheet for each household, to provide you with additional information to help you plan your approach and the interview. The coversheet contains the following information:

### Field information

- **Serial number**
- **Batch number**
- **Point**

### Eligible household members – summary info and best times to contact them

- **PNo:** Person number (used in the CAPI household grid)

#### Name

- **Surname**
- **Sex**
- **Adv letter:** Type of advance letter to send
  - Original
  - Refusal
  - No letter = No letter to send
- **Send with:** What to send the advance letter with:
  - Info leaflet
  - Newsletter
  - No letter
- **Best time to call**
- **Best day to call**

### Outcomes – to help you tailor your approach

- **HSE int date:** date of HSE interview (only for refreshment sample)
- **HSE outcome:**
  - Full int = full interview was carried out
  - Partial int = partial interview
  - Away/in hosp = respondent was away from home or ill in hospital
  - Ill at home = respondent was ill at time of interview
  - Refusal by per = interview refused by respondent
  - Refusal by prx = interview refused by proxy
  - No contact = no contact was made with household
  - Other unprod = other unproductive outcome
- **W1 int date:** date of Wave 1 interview
- **W1 outcome** (see codes above as well):
  - Full int: per = full interview was conducted with person
  - Full int: prx = full interview was conducted with proxy respondent
  - Partial int: per = partial interview was conducted with person
  - Partial int: prx = partial interview was conducted with proxy respondent
  - In institution = person was in institution at time of interview
  - Office ref= office refusal
  - Phys/men incap = physically or mentally unable/incompetent
  - Ref b4 int = refusal before interview
  - Ref during int = refusal during interview
  - Broken appt = broken appointment – no re-contact
  - Lang difficulties = language difficulties
  - Untraced = person could not be traced
- **W2 int date:** date of Wave 2 interview

- **W2 outcome** (see codes above):
- **Nurse outcome** (see codes above as well): Outcome of Wave 2 nurse visit  
Full N int = full nurse interview  
N/A = not applicable (e.g. because they were a new partner or young partner)  
Refusal = refusal
- **Date N letter sent:** date the letter with the results from the nurse visit was sent to the respondent (and to their General Practitioner if appropriate)

Information needed for interview/other info

- **IA Resp:** person who answered the income and assets (IA) questions at Wave 2 – ideally we want the same person to answer this time. The CAPI will ask you to check:  
Yes = Respondent answered the IA questions  
No = Respondent did not answer the IA questions – someone else answered on their behalf  
(Blank) = Respondent did not answer the IA questions and no one answered on their behalf
- **HO Resp:** person who answered the housing and consumption (HO) questions at Wave 2 – ideally we want the same person to answer this time. The CAPI will ask you to check:  
Yes = Respondent answered the HO questions  
No = Respondent did not answer the HO questions – someone else answered on their behalf  
(Blank) = Respondent did not answer the HO questions and no one answered on their behalf
- **Self-comp:** Which self completion questionnaire(s) to give to the respondent  
Blue = Core self-completion only  
Blue + green = Core self-completion + Green (Health) self-completion  
Blue + yellow = Core self-completion + Yellow (Work) self-completion
- **Email address** – to check at the end of the CAPI questionnaire (please do not use to contact respondent)
- **Type:** Type of sample member  
CM = core member  
CP = core partner  
YP= younger partner  
NP (W1) = new partner (identified at Wave 1)  
NP (W2) = new partner (identified at Wave 2)  
Pot CM = potential core member (refreshment sample)  
Pot Part = potential core partner (refreshment sample)

Stable contact and proxy nomination details

- **Type:** type of contact  
Stable = Stable address contact  
Prx nom= Proxy nomination contact
- **Name:** name of stable address person or proxy nomination
- **Relationship:** relationship to respondent
- **Address & telephone:** contact details of stable address contact/proxy nomination

- **Notes:** various information which you might find helpful. Some of this information was provided by the Wave 2 interviewer. The type of information entered here includes:
  - Parking information
  - Information about contacting the respondent (e.g. busy, works shifts)
  - Characteristics of the respondent (e.g. deaf)
  - Details of the proxy informant at Wave 2, if applicable
  - If moved into an institution
  - If moved to new address since Wave 2
  - If they took in the ELSA participants meetings (see Section 2.4)

### **Section of the ARF**

A: Establish whether or not any eligible individuals resident at address

- In this section you attempt to establish whether any of the eligible individuals (i.e. core members, young partners or new partners listed on the ARF information label) are resident at the address given on the ARF address label.
- This section should be completed for each household.

B: Movers tracing section (No eligible individuals at address)

C: Institutional Section

Please record all details of any eligible individuals who have moved into an institution and details of the proxy institution informant or the institution if relevant.

D. Eligibility for End of Life Interview

- Please record details about the person who has died, and details of the person who you do the interview with if relevant.

E. Individual Outcomes for eligible respondents at address (original or traced)

- You should record individual outcomes for all eligible individuals living at the address (including those who have died or moved to an institution).
- Please note that **you should only code 53**, physically or mentally unable/incompetent if after a proper effort you are not able to identify a proxy informant who can respond on behalf of the eligible sample member.
- Please note that if a respondent does not have adequate English to complete the interview then you should not carry out an individual interview but instead code them as unproductive here (54). While you can allow an individual to have help with some questions, they will need to answer the private modules alone, so must have reasonable language skills in English.
- You should also identify the appropriate self-completion status for each paper questionnaire and record this in the grid at E2.
- If an eligible respondent has moved into an institution or died, this should be recorded at E3.

F - Final Outcome for Household (original or traced)

- **Please note at the top of Section F, the reminder that if a household has split you should open an ARF B to find a follow-up address.**
- There is a new refusal section to complete if a respondent refuses, which asks you to code the reasons for refusal, your response to this refusal and how you think this case should be treated in the future. We will use this information to decide whether we can

reissue the case (and when), how we should approach the respondent in the future, and the methods we could use to encourage the person to take part in the future.

#### G - Details of the people who were interviewed

- This section should be completed during the interview (FQ section).
- This is where you record the details of the proxy nomination and stable address contact (if newly collected, or different from that printed on the coversheet).
- If a respondent was interviewed by proxy, and the proxy informant gives you their contact details, record this in the grid.

#### H - Details of the area

- This section should be completed for mover addresses only i.e. if the sample member(s) has moved from the original address and you have followed them up at the new address.

## 4.6 Movers

### ***Who to trace***

It is possible that all the sample members within the household will have moved since we last interviewed them for ELSA or, even more likely, since the HSE interview for the refreshment sample.

### Original Sample

- Please trace **all** eligible people from the original sample who have moved.

### Refreshment Sample

- Please trace all potential core members from the refreshment sample who have moved UNLESS they have moved outside of England.
- Please DO NOT trace young or old partners if they no longer live with the core member.
- You should **not** trace members from the refreshment sample who refused to be interviewed at HSE (look at coversheet).

### ***How you should find movers***

If all of the sample members have moved, you will be directed on the ARF to attempt to find a follow-up address for the sample members. There are various ways you can do this:

- Telephone contact with respondent (number may still connect to respondent)
- Give mover letter to present occupier (see next page)
- Contact with neighbours/addresses opposite
- Contact stable address by phone, visit or letter (via office)
- Contact proxy nomination by phone, visit or letter (via office) if appropriate
- Consult electoral register, phone books, public records
- Try local shops/post office

We would like to improve the way we record attempts to find movers. This will help in the decision about whether to allocate the case in the future. If you have a mover you will be prompted in the admin block to record how you attempted to find them.

Be careful not to give too much information to other people about why you are trying to contact the respondent. But do mention, if it helps, that the person was aware that we planned to recontact them in the future.

One important source of information will be the Stable Address contact provided by the respondent. Ideally, we would like you to make face to face contact with the householder at the stable address. However if this is not possible please use the contact telephone number provided on the cover sheet.

It may be possible to use the proxy nomination, although this person is likely to be either in the same household as the respondent, or the same person as the stable contact.

We would like you to do your best to make contact with movers, for two main reasons:

- movers will have had a different experience and we will benefit from their feedback
- even if it is impossible to find the respondent in the given time period, it may be possible to revisit them at a later stage.

### ***Mover Letters***

You may make contact with someone who knows the sample members' new address but is not prepared to give you this information directly. Ask them if they would give or post a letter to the sample member on your behalf. If they agree to do this, take a mover letter and write in:

- the serial number (**please also write this on the white New Address Information sheet that we ask the Sample Member to return**)
- the name of the individual(s) you are trying to contact
- the name of the person who has told you the Sample Member has moved away
- your name.

**It is extremely important that you also write the serial number on the white New Address Information sheet that we ask the Sample Member to return to us.**

Put this letter along with the white New Address Information sheet and a reply paid envelope into another envelope. Write the sample member's name on the front. Then leave it to the contact to forward the letter. Please write on the ARF that you have done this.

If you come across a situation in which all of the sample members have moved home and you have been given a new address, you should follow up the new address as long as it is local to you. If the new address is not in your area, please contact the team at Brentwood straight away. We would also like to know the addresses and telephone numbers for respondents if they have moved abroad. **Please remember that movers in the original sample at Wave 3, addresses in Wales and Scotland are eligible.**

If you are uncertain about whether the address is in your area, or have any other queries about movers, please ask your Area Manager or contact the Yellow Team at Brentwood.

### ***If a household has split***

You may find that some of the Sample Members are still resident at the address but other Sample Members have moved away. If this is the case, you will be directed by the ARF to complete an ARF B. The ARF B will help you to contact and interview the sample members who have split into a new household. All Sample Members, Younger Partners and New Partners should be traced if they were interviewed at Wave 2. If they were **not** interviewed at Wave 2, contact the office to find out if you should try to contact this person.

## **4.7 People who have moved into institutions**

Please see Appendix A for the definition of institution addresses.

You should attempt to carry out an interview with anyone who has moved into an institution, or do a proxy institution interview on their behalf if they are unable to do the interview themselves. The institution interview is now built into main ELSA CAPI interview. You should visit respondents in institutions to do the interview if they are in your area.

If you interview any respondents in an institution please ensure that the Care Home Manager has been informed. It may also be helpful if a family member of the person you are interviewing can be there whilst you carry out the interview.

The approach you should take to contact people for an institutional interview will be dependent on whether they are able to do the interview themselves or require a proxy institutional interview instead. There are three main scenarios:

### **(1) If the person in the institution has a partner living at home**

Any partner of a sample member in an institution will also be eligible for an ELSA interview. As a result some of the partners will be interviewed anyway, and the CAPI programme will prompt you to ask them whether their partner in the institution is able to do the interview themselves. If a proxy institutional interview is needed it is usually the spouse/partner who does it. The program can be set in the usual way so questions are asked concurrently or individually to this partner. If the sample member in the institution is able to do the interview themselves then you can find out how to contact them from their partner.

### **(2) If the person does not have a partner and they have a stable address contact or proxy nomination**

During the course of the Wave 2 interview, respondents were asked to nominate a relative or close friend whom we could contact if they moved without informing us of their new address (stable address contact). They were also asked to nominate someone we could contact if they needed a proxy interview in the future (proxy nomination). Respondents often nominated their son or daughter.

If you have a stable address contact and/or proxy nomination on the coversheet, you should contact the office so a personalised letter can be sent to one of these contacts. If the stable address contact and proxy nomination are different people, the proxy nomination should be prioritised. If a phone number is available, the letter should then be followed up with a phone call by you in order to identify who should do the interview.

Even if you have the address of the institution you should always go through the stable contact/proxy nomination first (i.e. before contacting the care home directly). It is important to get friends/family on-side, as this often helps when approaching care managers etc.

**(3) If the person does not have a partner and you only have an Institutional address**

If you only have an institutional address for an ELSA respondent, please contact the office so personalised letters can be sent to the Care Home Manager and the ELSA sample member themselves. If a phone number is available, the letter should then be followed up with a phone call by you to the Care Home Manager in order to identify who should do the interview (i.e. whether you can approach the person themselves, or a nominated proxy).

***Known institutionalised contacts***

In some instances, interviewers at Wave 2 were able to determine the type of interview required for an institutionalised respondent (i.e. normal or proxy), so you may have been issued with either the proxy contact details, or the direct details for the care home.

***Institutional CAPI interview***

We have developed routing within the ELSA program specifically for people who have moved into institutions. The content is broadly the same as the main interview, although some questions have been omitted and some structural changes to the modules have been made. A proxy version is also available for those unable to do the interview themselves.

***Incentive cheques***

A £10 cheque should be offered for all ELSA respondents in institutions (regardless of whether a proxy or non-proxy interview is completed).

A £10 cheque should also be offered to proxy informants.

**4.8 Refusers**

At Wave 3 we are reissuing some people who refused an interview at Wave 2, and we plan to follow this approach at future waves of ELSA. Therefore, we need to develop a strategy to help us to decide whether a refusal can be reissued (a soft refusal) or has to be removed from the ELSA sample (a hard refusal).

The ARF now has a 'Refusal Section' (Section F2-F6) which we would like you to complete should someone refuse. We would like you to code the reason(s) the respondent gives for refusing at F3 on the ARF:

**F3 REASONS FOR REFUSAL (CODE ALL THAT APPLY)**

Short term commitments (interview would not be convenient <u>at this time</u> )	
Long term commitments (ie. will be too busy in the foreseeable future)	
Questions are too personal	
Interview is too long	
Concerned about confidentiality	
Not interested in the survey subject matter	

Survey does not have public or personal benefit: survey is a waste of time	
Circumstances have not changed since last interview	
Spouse or partner opposes participation	
Other family member opposes participation	
Other	

We would also like you to record what you said in response to the refusal, and what you think may encourage them to participate in the future. There is space for you to write this in at F5 of the ARF. The information you provide may help us in our attempts to convert refusers in the future. For example, if an individual does not want to take part because he/she feels certain questions are too invasive, an adapted interview which excludes more sensitive questions could be used.

Finally we would like you to record how you think we should treat a given refusal in the future (F6):

**F6 How should this case be treated in the future? (please tick box or record in the space below)**

Reissue for Wave 3	
Reissue for Wave 4 (not Wave 3)	
No further contact	
Other	

**4.9 Incentive payment**

You have been given £10 incentive cheques in your work pack for all eligible sample members. The cheque should be offered as a token of our appreciation for doing the Wave 3 interview. Hence, it should be given to the respondent once the interview has been completed. You will be asked whether you have done this at the end of the interview.

If you do not have a pre-printed cheque for a respondent or there is a problem with the cheque, then please request a (replacement) cheque using the question at the end of the CAPI interview. Similarly, if the respondent would like a voucher instead of a cheque, please code this in the CAPI. It is essential you also **telephone the yellow team to inform them about any replacement cheques or vouchers that are needed.**

In the case of proxy interviews, you should give the cheque to the eligible sample member. If you think the proxy informant should be given a cheque as well, please request one from the team at Brentwood.

**4.10 Respondent/Interviewer safety**

The Multi-centre Research Ethics Committee stipulated that only interviewers with CRB clearance should work on this project. Many ELSA respondents could be considered vulnerable individuals either because of physical decline or because of low cognitive function. Interviewers must take particular care by:

- Not visiting late at night
- Always ensuring that computer leads etc. do not create physical risks to the respondent
- Taking breaks as appropriate and returning to the household at a later stage
- If unsure whether the respondent is able to give informed consent, taking the conservative view and offering to return, for example when a relative or carer can be present.

## 5. CONDUCTING THE CAPI INTERVIEW

This section gives an overview of the content and structure of the interview. Sections 5.4 to 5.9 explain how you should set up different aspects of the interview, which you will need to do in the household grid.

### 5.1 Content of the interview

The following table gives a brief outline of the content of the dress rehearsal CAPI questionnaire. We will focus on specific changes made within some modules in Section 6.

<b>Household demographics</b> This module updates the household grid information that was collected at Wave 2, and checks the eligibility for ELSA of all current household members (including New Partners).
<b>Individual demographics</b> This module updates or collects details about respondents' marital status, relatives and parents' age and cause of death.
<b>Health</b> This module covers many different aspects of people's health; longstanding illness or disability; eyesight and hearing; pain; difficulties with daily living (ADLs); and health behaviours (e.g. smoking and physical activity). New questions at Wave 3 record respondents' dental health and the help they have received for daily activities.
<b>Social participation</b> This module of questions covers the use of transport. New questions at Wave 3 record how often respondents use taxis, get lifts from family/friends, or use transport provided by a hospital, day centre or lunch club.
<b>Work and pensions</b> This module collects or updates information about respondents' current work activities. Questions relating to pensions (current/past) have been excluded from the dress rehearsal, as they are currently being re-programmed. New questions for Wave 3 relate to pension statements sent by the Department for Work and Pensions (used to forecast state pension at retirement).
<b>Income and assets</b> This module estimates the income the respondent(s) have received from a variety of sources – wages, state pensions, private pensions, other annuity income, and state benefits – over the last 12 months. It then explores the amount of financial and non-financial assets held in various forms. There are no changes since Wave 2.
<b>Housing and Consumption</b> This module collects information about the respondents' current housing situation, including the size and quality of the accommodation. There are no changes since Wave 2.
<b>Cognitive function</b> This module of questions measures a variety of different aspects of the respondent's cognitive function. Questions used to measure literacy have been dropped for Wave 3. All other tests remain the same. However, you now have the option to specify why some tests could not be completed (i.e. due to poor eyesight, difficulty using a pen etc.).

<p><b>Expectations</b></p> <p>This module of questions measures people’s expectations; the level of certainty they feel about the future, how they make financial decisions within their household and their optimal financial planning horizon. There are minor changes to this module, including the deletion of the questions about the most positive and negative aspects of ageing.</p>
<p><b>Psychosocial health</b></p> <p>This module of questions asks how the respondent views his or her life across a variety of dimensions. The questions about when the respondent thinks middle age ends and old age starts, which were in Wave 1, have been added back in.</p>
<p><b>Effort/Reward</b></p> <p>This module of questions assesses motivations behind voluntary work and caring for others, and the relationship between effort and reward. There have been no changes since Wave 2.</p>
<p><b>Final questions and consents</b></p> <p>This module of questions updates demographic information, stable address, details of any proxy informants and requests permission to link to health and economic data from various administrative sources. There have been changes to the consent procedure and there are new questions to set up the Retrospective Interview.</p>
<p><b>Measurement – Timed walking test</b></p> <p>The timed walk involves recording the time taken by respondents aged 60 and over to walk a distance of 8 feet (244cm) at their usual walking pace. There have been no changes since Wave 2.</p>
<p><b>Self-completions</b></p> <p>There are three self-completions included in Wave 3 (see Section 7). The main self-completion asks about the respondents’ quality of life, social participation, control at work, life satisfaction, social networks and alcohol consumption. Some questions which were asked in the Wave 1 self-completion have been added back in and some Wave 2 questions have been taken out of the main self-completion for this wave.</p>

## 5.2 Structure of the interview

The CAPI program is structured in such a way as to allow for flexibility and for different sections of the interview to be conducted in different ways (See section on Concurrent Interviewing below as well). Importantly, in households with more than one person eligible for interview, the program will allow you to interview up to two people concurrently. This means that the questions are split up into short blocks and you ask each block to the first person, then to the second person.

In concurrent interviewing sessions, the following sections are asked of both respondents concurrently:

- Individual demographics (ID)
- Health (HE)
- Social participation (SP)
- Work and pensions (WP)

The section on income and assets (IA) will often only be addressed to one person in a concurrent interviewing session (though the other person can be present). However, if a couple do not share their finances, it will be asked to both people, and in these cases the program will work in the same way as for ID, HE, SP and WP.

As the section in housing is only asked to one person in each household, in concurrent sessions only one of the people in the session will be asked these questions.

The following sections **must be completed privately**:

- Cognitive function (CF),
- Expectations (EX),
- Psychosocial (PS),
- Effort/Reward (ER)
- Final questions (FQ)

This is because the content of these modules is sensitive. All four of these modules are asked in one go to the first person in the concurrent session. Then they are all asked in one go to the second person in the concurrent session. At the start of this section, you will be prompted to ask the second person in the concurrent session to leave the room and complete a self-completion questionnaire while these four sections are asked in private to the first person in the session. Then when the first person has finished answering these sections in private you will be prompted to ask the second person to come back into the room to complete these four sections of the CAPI interview in private while the first person leaves the room to complete their self-completion.

In interviewing sessions where you only interview one person, you will be prompted to leave the self-completion behind with the respondent at the end of the interview.

Another important feature of the CAPI program is that the measurement/timed walk section is in a 'floating' block. This means that you can complete it at any time, once you have finished the Health section. To access this section, you should press CNTRL <ENTER> to bring up the parallel blocks and scroll down to select the Measurements block. You will first be prompted to do the timed walk (if any of the people you are interviewing are eligible i.e. 60 or over) after the section on social participation, which is where we would normally recommend that it should be done. However, you can do it later in the program.

### **5.3 Feed-forward data**

During some parts of the interview, answers given by respondents at a previous interview are fed-forward. This is usually to confirm what they said previously, and to detect possible change in their situation.

If members of our original sample did not participate at Wave 2, we have fed forward appropriate information from their Wave 1 interview if they had one.

We have household grid information and work status to feed-forward for our refreshment sample (taken from their HSE interview).

**Because of the use of feed forward data it is absolutely vital that all interviewing takes place in the slot allocated to that respondent. If an individual is interviewed in any other slot than their own, the interview will make little sense to them, and someone else's private information could be inappropriately revealed to them.**

## 5.4 Household demographics section

Information from Wave 2, Wave 1 and HSE about who is part of the household will be pre-loaded into the programme. You will need to check these details, collect them if they are missing or correct them if they are incorrect. You will also need to collect details of new household entrants and record some details about people who have left the household since the Wave 2, Wave 1 or HSE interview.

**The CAPI program will identify any new household members who are eligible for interview (i.e. new spouses/partners of sample members).**

### ***Recording whether the household is at same address as last interview***

You should record whether the household is at the same address as at the last interview at *DhSameh*. It is important to answer this question carefully as it will determine whether or not information from the previous interview about the household's housing situation will be referred to during the Housing section of the interview.

### ***Who should complete the household demographics section***

This section only needs to be completed by one person in each household. This can be anyone eligible for an interview, i.e. a sample member, young partner or new partner named on the ARF label or a new partner who has entered the household since Wave 2. Non-eligible household members or people outside the household should only complete the grid if all eligible respondents are unable to do so – either due to physical or cognitive impairment or because they are away in hospital/temporary care throughout the fieldwork period.

The rest of this section explains how you should set up different aspects of the interview, which you will need to do at different questions in the household grid. You should record who answered the household demographics section at *DhResp*.

## 5.5 Proxy Interviews

### ***Eligibility for proxy interview***

You should attempt to carry out an individual interview with **all** eligible individuals. If possible, interview all eligible individuals personally, even where there is some reluctance on the part of a carer or partner but the eligible respondent is happy and capable of carrying out an interview.

You should **carry out a proxy interview for eligible respondents in the following circumstances:**

- The respondent has a physical or cognitive impairment that prevents them from completing an interview on their own behalf,
- The respondent is away in hospital or temporary care **throughout the fieldwork period.**

If someone is expected to return home from hospital or temporary care before the end of the fieldwork period, please try to wait until they do so and attempt to conduct an interview with them in person. You may be told that the person would not be able to conduct an interview in person due to physical or cognitive impairment, even when they return from hospital or temporary care. If possible, you should wait until they do return home in order to make this assessment yourself and then, if necessary conduct a proxy interview because of their impairment. We would **not** want you to visit the person in hospital or temporary care in order to try to make this assessment.

Do **not** conduct a proxy interview for any other reasons, including:

- the individual does not speak English sufficiently well to do the interview
- you have trouble contacting the respondent (e.g. they are at work or abroad)
- the respondent is simply reluctant to do the interview

Respondents who have moved into an institution permanently are eligible for an **institutional interview** and therefore you should carry out an institutional interview (either in person or by proxy) in these cases (see Section 5.6).

### ***Proxy informants***

The proxy informant (i.e. the person who answers on behalf of the eligible respondent) can be any responsible adult (of at least 16 years or over) who knows enough about the respondent's circumstances to be able to provide information about them. Where possible, involve close family members such as a partner, son or daughter, but other people such as a carer could fulfil this role. In most instances, the eligible respondent will not be in a position to give consent for a proxy interview to be carried out on their behalf so you do not need to consult with them directly. Of course, you should not carry out a proxy interview if, for any reason, the eligible respondent specifically objects to you doing so.

### ***How to set up a proxy interview in the CAPI***

You should record if one or more respondents in a household need a proxy interview at *DhAnyPx*, and which respondent(s) need a proxy interview at *DhProxy*.

Once you have entered your answer to this question, please do not go back and change your answer. Indeed, **you will not be able to change it** once you have started to do the (proxy or non-proxy) interview.

### ***Content of the proxy interview***

The CAPI program will guide you through the proxy interview automatically. In all proxy interviews you will be asked to complete ID, HE, WP and FQ.

The proxy informant should answer the Household grid if there is no one else in the household eligible for an interview.

The proxy interview may include the income and assets module if the respondent is single or if there is no one else in the financial unit eligible for interview. If both members of a couple need a proxy interview, the section on income and assets will only be asked in one of their proxy interviews about both their finances.

HD*	Household grid
ID	Individual demographics
HE	Health (variant on main module)
WP	Work and Pensions
IA*	Income and Assets
HO*	Housing
FQ	Final questions and consents

As you progress through a proxy questionnaire, you will find that some proxy informants will have only a limited knowledge of the eligible respondents circumstances. Encourage estimates where reasonable but enter Ctrl-K when appropriate.

You will see that only a subset of questions is asked during a proxy interview and that there are a few additional questions in the health section asking the proxy respondent to assess the cognitive/psychosocial health of the relevant individual.

## 5.6 Institutional Interviews

### ***How to set up an institutional interview in the CAPI***

We have developed routing within the main ELSA program specifically for people who have moved into institutions. In order to carry out an interview with someone in an institution (or a proxy institutional interview with an informant) you should code that the respondent has moved into an institution (i.e. nursing or residential home) at *DHWhat*.

If the respondent is able to do the interview themselves then please code this at *DhMiPrx*. This will automatically set up a personal institutional interview.

If the respondent is not able to do the interview themselves then please code this at *DhMiPrx* and try and find someone to do a proxy institutional interview instead (see Section 5.5). If you find a proxy institutional informant then please code whether they are a household member or not at *DhMiPwh*. This will automatically set up a proxy institutional interview.

### ***Structure of the institution interview***

The institutional interview has the same modules as the main Wave 3 interview, and the content remains broadly the same for non-proxy, and proxy institutional interviews. However, questions asked in the Income and Assets module and the Housing module are influenced by whether the person in the institution has a partner, and whether they share finances or not (see below):

#### Couples

	<b>Questions asked of spouse at home</b>	<b>Questions asked of spouse in institution</b>
Partners who share finances	All IA All HO	No IA HO = consumption only
Partners who have separate finances	All IA All HO	All IA HO = consumption only

If both members of the couple are in an institution the following structure applies:

	Questions asked of spouse interviewed first in institution	Questions asked of spouse interviewed second in institution
Partners who share finances	All IA HO = reduced set of questions	All IA HO = reduced set of questions
Partners who have separate finances	All IA HO = reduced set of questions	All IA HO = reduced set of questions

Additional questions about partners at the start of the institutional interview control what modules are asked.

#### Single person in institution

The same modules will appear on-route as in a normal interview, but with fewer questions in IA and HO.

## 5.7 Concurrent interviewing and assignment of sessions

In households with more than one eligible respondent, two individuals can be interviewed concurrently. This means that the questions are split into short blocks and asked to one person then the next. Two is the maximum number of individuals that can be interviewed concurrently on this study. **Any two eligible respondents can be interviewed concurrently – regardless of their relationship.**

The main advantage of concurrent interviewing is that there is a time saving for the interviewer (see Section 5.10). However, the main disadvantage of concurrent interviewing is that each person has to give up more time. Most respondents will not mind this and will prefer to be interviewed together.

If there are two eligible people in a household who keep their finances separate, please check that they are happy to talk about their finances in front of each other before interviewing them together.

**A proxy interview can also be carried out concurrently with a normal interview.** You should only do this if the person who is doing their own interview is also acting as the proxy informant.

There are two different ways in which a concurrent interviewing session can be set-up. **The most important thing to remember is that once an interviewing session is set-up – either with one person or with two people – it CANNOT then be changed.** The different ways of setting up an interviewing session are as follows:

#### ***METHOD 1 – following the suggested allocation (Only for households with 2 eligible people)***

In all households with two people eligible for a personal (i.e. non-proxy) interview, at the end of the household grid you will be asked at *DhNow* whether you are about to

begin a concurrent interview with these two people. The CAPI suggests in what order you should interview these two people in the concurrent session.

If you want to carry out a concurrent interview with these two people **now** and you have no reason to change the order of the allocation displayed on the screen, then you should code 'yes' at *DhNow*. You will then be asked, at *DhSurY*, to confirm that you are about to begin an concurrent interview with these two people. Coding 'yes' at this question will mean that they will be allocated to a concurrent interviewing session – **once you have allocated respondents to an interviewing session, this CANNOT be changed**. So, after coding 'yes' at *DhSurY*, you will not be able to change your mind and choose NOT to interview them together.

If you code 'No' at *DhNow*, you can still interview the two people concurrently. However, you cannot do this by changing your answer to *DhNow*; you will have to allocate the respondents to a concurrent session manually using Method 2 below instead.

Similarly, if you want to interview the two people together BUT wish to override the order of the allocation to the session suggested at *DhNow*, then you should code 'no' at *DhNow* and select the order manually using Method 2 described below. You may decide to do this if, for example, you know that one person will have to leave before you expect the interview to end. You can allocate them to be first in the concurrent session, so you can complete their private CAPI section (i.e. CF, EX, EX, PS, FQ) with them before they leave and then leave the self-completion behind for them to return by post.

### ***METHOD 2 – manual allocation of sessions***

You will need to manually allocate eligible respondents to interviewing sessions if you code 'No' at *DhNow*, or if there is only one person or more than two people eligible for an individual interview. Respondents who need a proxy interview can be allocated to interviewing sessions in the same way as respondents who are completing their own individual interview. In households with more than one person eligible for interview you can choose to interview up to two people in each session.

At *AllocP1* you should enter the person number of the first person you wish to interview in the interviewing session. The names of all eligible respondents are displayed on the screen. If you want to interview a second person **concurrently** with this person you should enter their person number at *AllocP2*. If you don't wish to interview another person concurrently, or indeed there is only one person eligible for interview, you should enter '97: No one else' at *AllocP2*. After you have chosen who to interview in that session you will be asked to confirm the selection of respondents to the session at *SessConf*. This will set the interviewing session – **once you have allocated respondents to an interviewing session, this CANNOT then be changed**.

In households where there are more than two people eligible for interview you will need to interview them in more than one session. To start a second (or subsequent) interviewing session, press Ctrl <ENTER> to bring up the parallel blocks and select 'Individual\_Session [2]', then allocate any remaining respondents to the second session in the same way at *AllocP1* and *AllocP2*.

## **5.8 Who should complete the income and assets section?**

The section on income and assets should be completed by one person in each financial unit. A financial unit is defined as either a single person or a couple, so in most couples only one of them should complete the section on income and assets on behalf of both people. However, if a couple keep their finances completely separate, they will be treated as separate financial units and so will both be asked the section on income and assets about their own finances.

In all households with a couple eligible for interview, there is a question in the household grid (*DhIAsep*) which establishes whether or not they have joint or separate finances. If respondents share their finances, at *DhIAWho* you should code who will answer the income and assets questions. The CAPI program will direct you to look at the coversheet to find out who answered the income and assets module at Wave 2. If possible, please ask the same person to answer the module this time. However, although we have to record one person in the couple as answering the income and assets questions, ideally we would like both members of the couple to be present and to contribute to the answers.

## **5.9 Who should complete the housing section?**

The section on housing needs to be asked of one person per household, regardless of how many people there are eligible for interview. In households where there is more than one person eligible for interview, you will be asked to code either in the household grid (at *DhHou*) or at the start of the housing section (at *IhoWho*) which person should answer the housing questions. The CAPI program will direct you to look at the coversheet to find out who completed the housing section at Wave 2 and ideally the same person should act as the primary informant on this occasion as well.

As with the Income and Assets section, any eligible respondents in a household can contribute to the answers that are given by the named respondent.

Again, It is possible, though we hope unlikely, that you may not succeed in interviewing the person which you code in the grid as the person who should answer these questions on behalf of the household. If this happens and if the other member of the couple is willing, then please complete the section on housing with this person. (In order to do this you will need to change your answer to *DhHou* in the household grid.)

## **5.10 Interview Length**

At Wave 2 the interview length was an average of 1 hour and 25 minutes for an individual in a single session and around 2 hours when two people in a household were interviewed concurrently. Interview length varies significantly according to the circumstances of the individual concerned. Those who have many medical conditions to report, are working, have complex pension histories, or have a lot of assets and income, will tend to have longer interviews.

A long interview can present problems both in terms of gaining co-operation and scheduling the interview and in terms of respondent and interviewer fatigue. However there are various ways in which the flexibility of the CAPI program can help you manage the length of the interview and there are various compensating factors:

- Concurrent interviewing will save you time
- The interview flows well and is varied
- Respondents like the study and say it is interesting and relevant
- They do not generally complain about length if expectations are properly set
- Almost all the respondents have already been interviewed and agreed to be re-contacted so are relatively compliant and used to the question-answer process
- Many interviewers will be interviewing respondents who they have interviewed before
- Respondents will receive a £10 cheque for doing the interview.

Interviews conducted by proxy should be significantly shorter than main interviews because several modules of questions are entirely omitted.

## 6. SECTIONS IN THE CAPI QUESTIONNAIRE

In this section we have provided some additional information about specific elements of the CAPI questionnaire. For information about the household grid questions, please see Section 5.

### 6.1 Individual Demographics module

Question Name	Notes
DiMar	<p>Note that this question is about current, legal marital status. If the respondent says that they are married check whether this is their first and only marriage.</p> <p>Some new codes have been added due to the introduction of legally recognised civil partnerships. Civil partners may only be of the same sex and must have obtained legal recognition of their partnership. Probe whether the partnership was registered under the new provisions that came into force from December 2005.</p> <p>The new codes for people who are currently or were previously in a civil partnership are:</p> <p>(3) A civil partner in a legally-recognised Civil Partnership</p> <p>(8) Spontaneous only – In a legally-recognised Civil Partnership and separated from his/her civil partner</p> <p>(9) Spontaneous only – Formerly a civil partner, the Civil Partnership is now legally dissolved</p> <p>(10) Spontaneous only – A surviving civil partner (his/her partner having since died)</p> <p>(11) Spontaneous only – A civil partner and has been married or in another Civil Partnership before</p>
DiGnMy	<p>This question asks about the number of grandchildren and great-grandchildren. If a respondent has any great, great-grandchildren they can be counted here as well.</p>
DiSib	<p>As with children, step, adoptive and foster brothers and sisters can be included here but don't have to be. Brothers/Sister-in-law should not be counted.</p>
DiFJob	<p>This question will usually be asked about father's occupation, but will adjust depending on the answer given to <i>DiKLiv</i>. You should code the answer given as one of the pre-specified categories. Here are some example about the types of job that can be included in the different categories:</p>

	<p><b>Manager or senior official in someone else's business</b> could include shop manager, marketing or sales manager, health service manager, works manager, bank manager, transport manager</p> <p><b>Professional or technical</b> could include teacher, stockbroker, lawyer, engineer, architect, doctor, accountant, nurse, computer programmer, musician, train driver, police officer, graphic designer, footballer</p> <p><b>Administrative, clerical or secretarial</b> could include bank clerk, typist, secretary, civil service or local government clerical officer, VDU operator</p> <p><b>Skilled trade</b> could include tool maker, electrician, fitter, motor mechanic, sewing machinist, printer, carpenter, baker, builder, chef</p> <p><b>Caring, leisure, travel or personal services</b> could include ambulance driver, dental nurse, nursery nurse, travel agent, hairdresser, caretaker, undertaker</p> <p><b>Sales or customer service</b> could include shop assistant, market trader, sales representative, customer care adviser</p> <p><b>Plant, process or machine drivers or operators</b> could include assembly line worker, packer, asphalter, lorry driver, taxi driver</p> <p>If you are in doubt please either attempt to code and add a note (this is preferable) or simply enter in the note verbatim.</p>
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## 6.2 Health module

Some health questions from Wave 2 have been omitted in Wave 3, although they may be added back in the questionnaire in the future. The following questions have been added or changed at Wave 3.

Question Name	Notes
*New at Wave 3* HeDent, Hehdnta, Hedntb	We have added these questions on dental health to find out how dental state deteriorates and when problems arise. We intend to look at how dental problems may affect other areas of the respondents' lives e.g. sleep disturbance, social interaction and quality of life.
Hediac	The aim of this question is to make sure that the information we have about the cardiovascular conditions (e.g. angina or heart murmur) the respondent has been diagnosed with in the past are correct. If the respondent confirms they have been diagnosed with the condition then you should code 'yes'. You should code 'yes' in this situation <b>even if they no longer have the condition or if it is now controlled by medication.</b>  You don't need to add any notes about medications the respondent is

	taking as this will be asked about at <i>HeMdb</i> instead.
*New response category* Hedian	<p>Hedian checks why the respondent disputes that they had they have ever been diagnosed with the condition. We have added a new code (“Misdiagnosed”).</p> <p>At <i>Hedian</i> at Wave 2 more people than we expected said they no longer had some cardiovascular conditions. Medically these conditions are unlikely to have “gone away” from this age group. Hence, we have included follow-ups from these question to find out whether they are in fact taking medication (which accounts for it “going away”. See <i>HeMdb</i> as well.</p>
*New at Wave 3* Hediax	We have added this new question as a double check of whether they had the condition at their last interview. See <i>Hedian</i> and <i>HeMdb</i> as well.
*New at Wave 3* HeMdb	This question is asked if the respondent says they no longer have a cardiovascular condition that they had at Wave 2. It explores whether respondents are taking medication to keep the condition under control, which in turn makes them report that they no longer have the condition.
Hediad	As with <i>Hediac</i> , the aim of this question is to make sure that the information we have about the chronic conditions (e.g. asthma or arthritis) the respondent had at Wave 2 were correct. If the respondent confirms that they did have the condition at Wave 2 then you should code ‘yes’. You should code ‘yes’ in this situation <b>even if they no longer have the condition or if it is now controlled by medication.</b>
*New response category* Hediam	This question is asked if our records show that the respondent had a particular chronic condition at Wave 2 but they dispute this at <i>Hediad</i> . This question checks why the respondent disputes that they had the condition at Wave 2. If the respondent says that they did tell us they had the condition in their last interview, but they have since found out that this condition was misdiagnosed then please use the new code (“Misdiagnosed”).
*New at Wave 3* Hediamx	At <i>Hediam</i> at Wave 2 more people than we expected said they no longer had some chronic conditions. Medically these conditions are unlikely to have “gone away” from this age group. Hence, we have added this new question as a double check of whether they had the condition at their last interview.
*New response category* HeDiab	<p>This question covers other chronic illnesses and conditions. Again only conditions that have been diagnosed by a doctor should be included here and all conditions that the respondent has <i>ever</i> had diagnosed should be included.</p> <p><i>Hediab</i> now has a separate code for blood disorders in order to identify people who have leukaemia or lymphoma. Although formally these are types of cancer, we think that we were probably underestimating how many people had them at Wave 2, as the old question focused on tumours.</p> <p>Note: Alzheimer's disease is a specific illness, distinct from dementia.</p>

	<p>For most of these conditions, there are follow-up questions though they vary with condition. Age of diagnosis, whether they have had the condition in the last two years and whether they are currently on medication for the condition are the most common questions.</p> <p>If the respondent said that they had some of these conditions in their last interview then they will be asked whether they still have these conditions at the questions described above. They will then be asked <i>HeDiaa</i> to find out if they have been diagnosed with any <b>other</b> conditions since we last interviewed them.</p>
<p><b>*Changed since Wave 2*</b> HeJi</p>	<p>This question has been changed to ask if respondents have had any joint replacements or resurfacing. Resurfacing is a surgical technique used for arthritis patients which involves filing the bone at the joint.</p>
<p><b>*Changed since Wave 2*</b> HeJiaa, Hejibrh, Hejiblh, Hejibrk, Hejiblk</p>	<p>At previous waves we grouped together all joint replacements which meant we could not tell which joint had been replaced and the reasons for each replacement. These questions have now been expanded to enable us to do this.</p>
<p><b>*New at Wave 3*</b> HeAnd1</p>	<p><i>HeAnb</i> and <i>HeAnd</i> have response options for “never walk” and/or “cannot walk”. At previous ELSA interviews respondents have been inconsistent in their answers to these questions – saying they “cannot walk” at one question but not another. Therefore we have added this new question to determine whether they are not walking because they know it would give them pain (also see <i>HeRpe1</i> and <i>HeCdd1</i>).</p>
<p><b>*New at Wave 3*</b> HeRpe1</p>	<p><i>HeRpd</i> and <i>HeRpe</i> have response options for “never walk” and/or “cannot walk”. At previous ELSA interviews respondents have been inconsistent in their answers to these questions – saying they “cannot walk” at one question but not another. Therefore we have added this new question to determine whether they are not walking because they know it would give them pain (also see <i>HeAnd1</i> and <i>HeCdd1</i>).</p>
<p><b>*New at Wave 3*</b> HeHph, HeHpw HeHpd, HeHpp HeHpt, HeHpm HeHps</p>	<p>At Wave 2, if respondents reported having difficulties with activities at <i>HeAdla</i> or <i>HeAdlb</i> they were asked one question about who helped them with <u>any</u> of these activities. In Wave 3 respondents will be asked separate questions about who helps them with the different activities they have difficulties with.</p>
<p><b>*New at Wave 3*</b> HeHps</p>	<p>This question has been added to find out whether people who report having difficulties with activities at <i>HeAdla</i> or <i>HeAdlb</i> visit an occupational therapist, physiotherapist or chiropodist, or attend exercise classes. This question, and the ones above, have been suggested by the Department of Health. They are interested in finding out more about the services that are being received and what health problems these services are intended to</p>

	deal with.
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### 6.3 Timed Walk (Measurement) module

The timed walk, which involves recording the time taken by the respondent to walk a distance of 8 feet (244cm) at their usual walking pace, is included in the study as it is an objective measure of disability. It has been shown that there are cultural differences in the way people answer questions about their levels of disability so in order to be able to compare people in England with people in other countries we need this measure.

Please see Appendix B for the full protocol of how to carry out the timed walk test.

#### ***Who should complete the timed walk/measurement section***

Only respondents aged 60 and over who are able to complete an interview themselves (i.e not proxies) are eligible to do the timed walk/measurement section (MM). The CAPI will tell you who is eligible at *Eligible* in the household grid. We hope that all respondents aged 60 and over will do the timed walk but there are some questions in the CAPI which ensure that it is safe to carry out the test.

#### ***When to do the timed walk/measurement section***

You can choose when to conduct the timed walking test. You may wish to do this when there is a natural break in the interview, to avoid breaking up the flow of the interview. Or you may want to break up the interview, if you feel that either you or the respondent is becoming fatigued.

#### ***Timed walk card***

The timed walk involves recording the time taken by the respondents to do the timed walk. Times are recorded on this card (which remains unchanged from Wave 2), and sent back to the office. Respondents should not keep a record of their performance, so **please do not leave this card with them.**

### 6.4 Social Participation Module

New questions on public transport usage came from interests of the Department of Transport. We know that access to a car is very important in improving quality of life for older people. We would like to be able to measure the impacts of reducing car use on other aspects of peoples' lives e.g. accessibility to services, social participation and health. It is also important for us to understand the role of others outside the household, e.g. family and friends providing lifts by car.

<b>*New at Wave 3*</b> SPCarB	For respondents who say that they don't drive now, we have added a question to find out if they drove in the past.
<b>*New at Wave 3*</b> SpTrO, SpLift,	If respondents say that they have access to a car as a passenger or if they are aged 65 or over, we ask if they ever use any of the following means of transport, and how often:

SpTaxi SpDtDT SpHosp	<ol style="list-style-type: none"> <li>1. Lifts from family or friends who do not live with them</li> <li>2. Taxi</li> <li>3 Door-to-door community transport, e.g dial-a-ride</li> <li>4. Transport provided by hospital / day centre / lunch club</li> </ol> <p>For your information, a lunch club is a commonly-used term for a centre where a communal meal is provided and older people have a chance to meet others.</p>
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## 6.5 Work and Pensions module

In this section we outline the changes to the Work and Pensions module since Wave 2. Please see Appendix D for notes on questions that were also included in this module in previous years.

In this module, some questions use ‘unfolding brackets’. They reduce the number of individuals who do not answer these questions and help us understand the extent to which people ‘anchor’ their answers. This is the first study in the UK to use this technique. At Wave 3, respondents will use the same random entry point to each bracket as they were assigned at Wave 1 and 2 (though in fact, they may not have been asked that bracket at Wave 1). This means that we will have information that we can interpret consistently across waves.

### ***New questions on State Pension Forecasts***

We have added new questions about state pension forecasts that have been sent out by the government. This is a free service provided by the Pension Service (part of the Department for Work and Pensions) which estimates what an individual’s state pension might be at retirement. The service was started in 2003 with forecasts sent automatically to people under state pension age. There are roughly 35 million adults aged under state pension age in the UK, and over 12 million forecasts had been sent out by the end of November 2005. The over 50s age group was targeted first, so the proportion of ELSA respondents who should have received their state pension forecast should be higher than the 1/3 suggested by these overall figures.

The state pension forecast is an excellent way of gaining an understanding of what state pension benefits might be. In principle it can help people to decide whether they need to save more for their retirement. The forecast estimates:

- the amount of pension built up so far, in terms of current prices; and
- the total amount of pension that might be built up at State Pension Age, in terms of current prices

The forecast covers not just the Basic State Pension but also the Additional State Pension (i.e. SERPS and S2P) and any Graduated Retirement Benefit that has built up. Therefore it gives a very complete coverage of an individual’s state benefits and is the best source around for an estimate.

To be eligible to receive the State Pension Forecast you need to be:

- living in the UK
- aged over 16
- more than 10 days away from State Pension age

Respondents will be asked to quote figures mentioned in their forecast, so most will need it to hand during the interview.

Our new questions may prompt people who have not yet received their State Pension Statement to find out more. You can advise people that a state pension forecast can be requested in the following ways:

**1. Online**

[www.thepensionsservice.gov.uk](http://www.thepensionsservice.gov.uk)

**2. By phone**

Respondents can call the Retirement Pension Forecasting Team on 0845 3000 168 (textphone 0845 3000 169). Lines are open 8.00 am to 8.00 pm Monday to Friday, and 9.00 am to 1.00 pm on Saturdays.

**3. Application form**

If they prefer, they can complete and return an application form (BR19). There are two ways to do this:

- download an application form from The Pension Service website, print it out, fill it in by hand and return it by post
- download an application form and fill it in on your own computer, print it out and return it by post

**Example of a pension forecast:**



Part of the Department  
for Work and Pensions

	Our address:	Retirement Pension Forecasting Team The Pension Service Whitley Road Newcastle upon Tyne NE98 1BA
Joe Bloggs Anywhere Rd Anytown Any shire AN99 9YY	Phone:	0845 3000 168
	Opening hours:	Monday to Friday 8am to 8pm Saturday 9am to 1pm
		0845 3000 169
	Textphone:	
	Website:	<a href="http://www.thepensionservice.gov.uk">www.thepensionservice.gov.uk</a>
	Date:	

Dear Jo Bloggs

***Have you thought about how much money you will have when you retire?***

We are writing to tell you how much State Pension you may get when you reach State Pension age. Retirement may seem a long way off but thinking about it now can make a big difference to your future.

The State Pension will give you a start. However, to have the lifestyle you want, you might need to think about saving some more, working longer or retiring later.

Now is the best time to take action and build up extra savings because you still have a number of years ahead of you before you reach State Pension age. It can be difficult to balance financial commitments such as setting up a home, paying off debts and enjoying life. However, the sooner you start to save for retirement, the more affordable it will be.

**Your State Pension forecast**

**If you retire at State Pension age, we estimate your total State Pension will be £0.00 a week at today's prices. This figure includes:**

<b>Basic State Pension</b>	<b>£00.00</b>
<b>Additional State Pension</b>	<b>£00.00</b>

### ***New CAPI questions in the Work and Pensions module:***

WpSfor, WpPfdM, WpPfdY, WpFPr, WpFPN, WPSpfu, WpBPs, WpAp, WpAPs, Wppfex	<p>These are the new questions on state pension forecasts (described above). Respondents under State Pension Age are asked if they have received a forecast, when they received it, how much they were forecast, if they understood the information provided in the forecast and how the amount forecast compares with what they expected.</p> <p>The State Pension age is currently 65 for men, and 60 for women, rising to 65 by 2020.</p> <p>Also see comments about <i>WpSpfu</i> below.</p>
WPSpfu	<p>If they did not understand the information in their forecast, please write a note explaining what they did, if anything, as a result.</p>
WpSpay, WpSpam, WpSpaw	<p>Female respondents under the age of 60 are now asked if they know when they will reach the State Pension Age and if they are aware that the State Pension Age for women is changing.</p> <p>The State Pension age is currently 65 for men, and 60 for women, rising to 65 by 2020.</p>

## **6.6 Income and Assets module**

Please see Section 5.8 for information about who should completed the Income and Assets module. Please also see Section 6.5 for information about unfolding brackets in the questionnaire.

You can skip the income and assets module and return to it at the end of the interview or at another date.

## **6.7 Housing and consumption module**

Please see Section 5.9 for information about who should completed the Income and Assets module. Please see Section 6.5 for information about unfolding brackets in the questionnaire.

As with the income and assets module, you can skip the housing and consumption module and do it at the end of the interview or on another date.

## **6.8 Cognitive Function module**

Please see Appendix C for detailed instructions about how to carry out the different tests in the Cognitive Function module.

### **Cognitive function booklet**

The cognitive function module includes various measures including memory, mental speed and flexibility. Literacy has been dropped for Wave 3. The cognitive function booklet itself remains unchanged from Wave 2. **Please remember to write the serial numbers on the top of these booklets:** over 50 booklets could not be used for the Wave 2 mainstage because we were unable to identify the respondent.

#### **Change to the CAPI questions in the Cognitive Function Module:**

CfAni	We have added a help screen so you can check the rules for scoring the animal naming task (See Appendix C),
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### **6.9 Expectations Module**

#### **New CAPI question in the Expectations module:**

EXLO90	In Wave 2 we asked respondents what they thought their chances were of living to a particular age. The age we asked about depended on the respondent's current age. In Wave 3, we have added a new question after this for <u>all respondents aged under 70</u> which asks what they think their chances are that they will live to be <u>85 or more</u> . By asking everyone about their chances reaching the same age, this enables us to compare the different responses people give.
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### **6.10 Final Questions module**

#### **Stable address**

At Wave 2 we asked respondents to nominate someone we could contact in the future if they moved and we could not trace them. This is known as the "stable address contact".

If we have a stable address recorded for a respondent it will have been printed on the coversheet. If the stable address contact was not recorded at Wave 2 we would like you to collect this information and ensure it is entered into the admin block. To do this you may have to enter code 2 "contact details not correct" at *FqStC*.

**Please remember to record the details of any new stable addresses or any changes/corrections in the admin block.**

#### **Proxy nomination**

At Wave 2 we also asked respondents to nominate someone we could contact in the future to do an interview on their behalf should they be unable to do it themselves due to ill health etc. In effect, respondents were providing us with a future proxy informant or end of life interview informant.

Again, if this was recorded by the interviewer at Wave 2 it is printed on the coversheet. If not, then please (re)collect it and ensure the details are entered into the admin block. To do this you may have to enter code 2 “contact details not correct” at *FqProxb*.

In most cases it is a husband/wife that is nominated as a future proxy informant. As a result we have added a new question which enables you to code this straight into the CAPI rather than having to enter all the address details again in the admin block.

***Linkage of data to Department of Health and Department for Work and Pensions records (yellow consent form)***

Respondents at Wave 1 and Wave 2 were asked whether we could link their data to records held by the Department of Health (DH) and the Department for Work and Pensions (DWP) and the Inland Revenue (now Her Majesty’s Revenue and Customs, HMRC). Both of these consents were asked for on the same consent form.

The consent form at Wave 3 is slightly different from the one used at previous waves. In Waves 1 and 2 the economics consent section asked respondents for their consent to link to their National Insurance contributions, benefits, and tax credits. However at Wave 3 we are also asking for their permission to link to their tax records (rather than just their tax credits) in addition to information about their savings and pensions. However, at this wave we will only be asking **new** respondents to sign this consent form.

The CAPI will automatically take you to the appropriate version of the consent question (depending on whether they consented to one, both or neither linkages in the last interview).

**If their consent is unchanged:** record this in the CAPI and the respondent has nothing to sign. We are not giving respondents a reminder form this time.

**If they wish to withdraw their consent:** use the “withdrawn consent” code in the CAPI. We will contact the respondent directly from the office.

**If they want to ‘upgrade’ their consent** (i.e. if they only gave consent to one of the linkages last time, and they now want to give consent to both): you will need to get them to sign a new yellow consent form.

**Respondents who did not give consent before:** (refreshment sample, new partners etc.) - If they are willing to give their consent please ask them to sign the yellow form. If they are only willing to give their consent to one of the linkages then please cross out the consent they do not give.

If the respondent asks for a copy of the consent form they signed at Wave 2 then please code this in the CAPI and we will send one from the office. However, please don’t encourage respondents to ask for a reminder form. Please do not give respondents a copy of the new yellow form as it is different from the one at Wave 2.

***Linkage to the NHS Central Register (pink consent form)***

Respondents will only be asked to provide consent if this was not given at a previous interview. This will only apply to a few respondents, as most will have given their consent during their HSE interview.

### ***Questions about setting up an end of life interview***

If a household includes more than one eligible person, and one of them has died, the other respondent will be asked if they are willing to do an End of Life interview about that person (*FqEilnt*). If they are willing then you will need to record the details on the ARF and on an ERF (see Section 8.6) and arrange an appointment to do the interview. If this respondent is not willing to do the End of Life interview, then they will be asked to nominate someone else to do it. Again, you will need to record the nominated informant's details in the ARF and in an ERF.

### ***Questions about setting up an institution interview***

If a household includes more than one eligible person, and one of them has moved into an institution, the other respondent will be asked some questions about this in the final questions module. If the respondent said at *DhMiPrx* that the person in the institution would be able to do the interview themselves, then they will be asked if they can provide details of the institution. You will be asked to enter these details at Section C of the ARF.

If the respondent said at *DhMiPrx* that the person in the institution would not be able to do the interview themselves, then they will be asked to provide details of someone who could do a proxy institution interview. Again, you will be asked to enter these details at Section C of the ARF.

### ***Retrospective Interview***

In the final questions module you will be prompted to ask respondents if they would be willing to do the Retrospective Interview (see Section 9). This is a brand new interview which will ask respondents about events in their past life, e.g. their education, family, work, and the places where they have lived. If the respondent is willing to do the interview and you have the retrospective program on your laptop already, you will be prompted to arrange a time to do the interview. If you do not have the program yet, you should tell the respondent that you will contact them in the near future to arrange the interview.

## **7. NEW SELF-COMPLETION QUESTIONNAIRES**

There are three self-completions included in Wave 3. Every respondent will be asked to fill in the main self-completion questionnaire (BLUE). Each respondent will also be randomly allocated so that they will either be given one of the other 2 questionnaires or no additional questionnaire. No respondent will be asked to complete more than 2 questionnaires. This has been done as follows:

1. Health self-completion (GREEN), plus main self-completion (BLUE) (allocated to 1/3 of sample)
2. Work self-completion (YELLOW), plus main self-completion (BLUE) (allocated to 1/3 of sample)
3. Main self-completion (BLUE) only (allocated to 1/3 of sample)

Individuals within a household may have been assigned a different type of self-completion. The self-completion you will be required to take is recorded on the information label, and you will be prompted at the end of the CAPI interview to give the appropriate one(s).

### **7.1 Main core self-completion**

The main self completion is similar to that used in Waves 1 and 2. The same protocol as Wave 2 should be used. When interviewing two people in a concurrent session, the main self-completion should be completed during specific sections of the interview when a partner is being interviewed privately. If interviewing one person on their own, the main self completion can be left at the end of the interview to be posted back by the respondent.

### **7.2 Health and Work Self-completions**

The health and work questionnaires are experimental. This means that they will only be given to a small sample and the data is being collected to help us learn from this.

The Health and Work self-completions are both made up of two sections. The first asks respondents to rate various aspects of their own situation on a 5-point scale. These questions focus on mobility, pain, cognition, sleep, and depression. This questionnaire was used in the Survey of Health and Retirement in Europe (see Section 1.1).

In the second section of the two questionnaires, respondents are asked to rate the situation of various hypothetical people who experience different circumstances on the same 5-point scale used in the first section. Respondents are asked to assume that the hypothetical people used in section 2 have the same age and background that they have.

These self-completions are designed to take into account the fact that people of different countries, genders, age bands and socio-economic groups may rate similar circumstances differently. The questionnaire enables researchers to see how different respondents rate themselves compared with how they rate the hypothetical examples. This information can be used to make comparisons between different groups or across time. The questionnaire allows cross-group and cross-country analyses as very similar questionnaires have been used across Europe and in the US.

## **8. END OF LIFE INTERVIEW**

### **8.1 Background**

The End of Life interview (then named the 'Exit interview') was introduced at ELSA Wave 2. For this interview we will be approaching a close friend/relative of an eligible ELSA respondent who has died since Wave 2 to do an interview about the deceased.

The Health and Retirement Study (HRS) in the United States successfully adopted an End of Life interview, and the content of this interview has been revised for use in ELSA.

The aim of the End of Life interview is to complete the information collected at previous waves of ELSA. We can link the answers given by the late respondent at Waves 1 and 2 to those given in their End of Life interview, to find out how their lives may have changed in the two years preceding their death. We are interested in their health, social circumstances, and financial situation over this time, and what happened to their assets after they died.

### **8.2 Eligibility**

We will be conducting an End of Life interview for respondents who took part in ELSA Wave 2 and agreed to be re-contacted.

At Wave 2 we only conducted these interviews if the respondent had died more than six months ago. The main reason for this was that it can take a few months for people's finances to be sorted out after they die. However, at Wave 3 we will be carrying out End of Life interviews with respondents who have died at any time. There is a screening question at the beginning of the End of Life program to find out if their finances have been sorted out, and if they haven't, then the financial questions will not be included in the interview. We will carry out a follow up interview by telephone to ask about the finances.

### **8.3 Mode of interview**

You should conduct the End of Life interview face-to-face if the respondent lives in your area. If the respondent lives out of your area, NatCen's telephone unit will contact them to conduct the interview over the phone.

You can also give other End of Life respondents the option to do the interview with NatCen's telephone unit if you think they would prefer this (regardless of whether in/out of your area).

### **8.4 Addresses issued to interviewers**

Since Wave 2, some relatives/friends of ELSA members who have died have notified the Brentwood office of the death.

Addresses for people known to have died will only be issued to interviewers if there is another household member still eligible for an ELSA interview at Wave 3.

If a respondent lived alone and we have since been notified of their death, we will not issue this address to interviewers.

If the office has not been informed of a death, you may be the first to establish this. If other household members are eligible for the ELSA interview, information about the deceased will be collected in the CAPI interview and recorded in the Final Questions module (FQ). However, if no other household members are eligible for the ELSA interview you will need to record the information about the deceased directly in the admin block, and if possible try and identify a potential End of Life interview respondent.

## **8.5 Who will act as an informant?**

Any close relative/friend or carer of the deceased can complete the End of Life interview. It is up to interviewers to identify who is best placed to answer the questions.

### ***How do I establish the best person to do the End of Life interview?***

1. The most common way of identifying an End of Life interview respondent is during the main ELSA interview (if at least one eligible household member has agreed to the ELSA interview). After the household grid, you are prompted to establish who is the best person to speak to about the deceased, and then, during their FQ module, ask whether they would be willing to be the End of Life interview respondent. If they are not willing, they are then asked to nominate another person who they think would do the interview (living in or outside their household).

**Questions relating to the End of Life interview will only appear in the ELSA CAPI program if the deceased agreed to be recontacted at Wave 1.**

2. If no other members of the household (that lived with the deceased) are eligible for an ELSA interview, you could still approach them and ask for consent to do the End of Life interview. Details of a potential End of Life interview respondent would need to be recorded on the ERF, because no FQ module would be completed.
3. If you identify an ELSA member who lived alone who has died, you could ask a neighbour for information about a potential End of Life interview respondent. However, if this proves difficult please just record an unproductive outcome.

## **8.6 End of Life interview Record Form (ERF)**

You will need to write in details about the person who has died at Section D of the Main ELSA ARF. You will also be asked to open up an End of Life interview Record Form (ERF).

Contact details for the (potential) End of Life interview respondent need to be entered on the front page of the ERF.

On the front page, you will also need to enter:

- The serial number of the deceased.

- The full name of the deceased
  - The date of death
  - Other information (i.e. relationship of potential contact to deceased, and whether he/she is stable address contact)
- A1 Please code whether the potential End of Life interview respondent lived in the same household as the deceased or not.
- A2 If the person nominated is in a different household, you will need to assess whether they live in your interviewing area. If you have any concerns about this, please contact your project manager. If the person lives out of your area, a telephone interview will be offered instead from Natcen's telephone unit, so you will need to code 923 "telephone interview required" and send the ERF back to the office.
- A3 If the person nominated is in your interviewing area, then please approach them for a face-to-face End of Life interview.
- A4 This question checks whether you actually managed to speak to the potential contact given to you.
- A5 It is possible that upon approaching the contact, you find out that they are not best placed to do the interview. If anyone else is nominated to do it, you should record their contact details at A6.
- A7 You will need to make sure that the second nominee is in your interviewing area. Again, if they are not in your area you will need to code 923 "telephone interview required" and send the ERF back to the office.
- B Please code a final outcome for the End of Life interview. This will need to be entered in the admin block in the End of Life interview program.

## **8.7 End of Life interview program**

When you open up an ERF, you will also need to open up a CAPI slot in the End of Life interview program. The End of Life interview has a separate project number (P2696). For every ERF you open, you will need to record a final outcome code in the admin block in the End of Life interview program.

When you record an eligible respondent as having an outcome of being dead in the admin block and you transmit this back to the office, you will automatically be sent the End of Life interview slot for this person. This should be sent you within a few days.

If you require the End of Life interview program and it is not already loaded on your computer, please contact Brentwood and allow at least 2 days for it to become live.

### ***Content of End of Life interview***

The questionnaire includes questions on some of the following topics:

- Health of deceased in year preceding death (physical and mental)
- Care and support needed in 3 months preceding death

- Memory/mood in last year preceding death
- Problem behaviour
- Financial questions – private health care, funeral expenses, inheritance – houses, businesses, other assets.

## 9. RETROSPECTIVE INTERVIEW

All sample members who are eligible for the main interview and who have a main interview are also eligible to have a retrospective interview.

The retrospective interviews are going to start in July 2006. You will be asked to attend another briefing to learn about the retrospective.

The retrospective interview is going to be a CAPI interview but it will use a new program, which is different from the normal Blaise program.

### ***Purpose of the retrospective interview***

Most of the information we have about ELSA respondents relates to what has happened to them since we first interviewed them for the Health Survey for England (HSE). At HSE they were all over 45 years old and some were already in their nineties. So we know little about what happened earlier on in their lives.

Many aspects of early life have a significant impact on people's health, economic circumstances and quality of life in later years. The retrospective interview will give more detailed information about respondents' childhoods and important events throughout their lives. This will enable us to find out the effect these have on the circumstances of older people.

### ***Data we want to collect in retrospective interview***

The retrospective interview will include questions on the following:

- Housing and geographical mobility
- Siblings' births and deaths
- Parents' separations and divorces
- Cohabiting relationships
- Children and grandchildren
- Education
- Jobs and earnings
- Health
- Positive and negative events in their lives
- Important achievements they have made

### ***Arranging the interview***

Convincing respondents of the importance of the second stage of this survey is an essential part of your work and should be taken as seriously as getting an interview in the first place.

The question called *FqRetro* at the end of the main interview gives an introduction to this second stage of the survey. Use this wording to start with. But sometimes you will need to provide further information in order to convince people of the importance of this stage. They may want to know more about what is involved.

As with the doorstep introduction, say what is needed in order to gain co-operation but do not add more as there is a risk this will confuse or raise concerns.

If a respondent is willing to do the interview before the retrospective program is put on your laptop, please tell the respondent that you will contact them to arrange an interview in the near future. Once you have the program you will be able to contact the respondent to arrange the retrospective interview.

## APPENDIX A – Definition of an Institution Address

We are using a standard definition of **an institutional address**. This is one at which:

- the establishment is run or managed by the owner or by someone who is employed to run it.
- four or more people, not all related to each other, live and are catered for **communally** (i.e. by someone else who is paid to provide them with board and lodging).

Small communal establishments with fewer than ten rooms are treated as **private households** if:

- there are fewer than four unrelated people staying there
- there are no resident staff other than the warden, proprietor etc (and his family).

In small communal establishments such as these (eg boarding houses and guest houses), the usual rules for deciding who is a household member apply.

**One point to note:** sometimes there are private households within institutions; for example, a warden of an old people's home or a school caretaker may have a flat within the home or school, with its own living room and catering facilities. These people are living in private households and are still eligible for interview when those living in the institution themselves are ineligible.

Some establishments are borderline cases because the people living there have their own **separate accommodation with facilities for cooking** (e.g. some sheltered housing for the elderly). If less than half the people living there have these facilities, count it as an institution. If at least half have these facilities, **whether or not they use them**, count them as a collection of private households.

## APPENDIX B – Protocol for the Timed Walk

### *Introduction and purpose*

The purpose of the timed walk (measurement section) is to objectively measure the overall health and level of disability of a large population of people aged 60 years and above. Walking speeds in older people have been shown to be very predictive of level of disability, future use of health care and mortality. This test will allow us to gather very important information about the respondents.

This is a unique opportunity to gain valuable information because we will be able to compare the results we gather with a large study that has been done in the United States. We will be comparing the data we gather now with the data collected at the last interviews and at future interviews. In addition, we will be comparing our findings with those from the US. As a result, it is very important that the test is performed the same way every time.

Reassure respondents that it is very important that they repeat the test this time, even though they have done it before. This is one of the best ways we can measure everyone's physical well being in a standard way so that we can compare people of different characteristics, at different times and in different countries with confidence that the test 'means' the same in all circumstances.

### *Content*

The Timed Walk involves timing how long it takes to walk a distance of 8 feet (244 cm). Our target is to measure **everyone** we interview who is aged 60 or older, as this is a key part of the survey. That said, the test should only be performed if it is safe to do so.

### *Description of equipment*

You will use a tape measure with the correct distance marked on it, a measurement card to record the time of each test and a stopwatch to carry out the timed walk.

The tape measure is easy to operate and has a lock on it to keep it open while it is being used. Please release this lock **very carefully** as it can easily hurt you or someone else. Please also ensure that it does not become an obstacle that could trip someone.

You will be given a measurement card to remind you of the key points to remember when performing the test and to record the test results as you go along. The card should be placed at the end of (or, if necessary, adjacent to) the walking course so that you can easily fill in the information after each walk is completed.

### *Stopwatch instructions*

Before you begin interviewing please ensure you are familiar with using the stopwatch. You only need to remember three things:

*To change from time mode to stopwatch mode:*  
Press the middle button labelled "Mode".

*To reset the stopwatch:*

Press the button on the left-hand side.

*To start and stop the stopwatch:*

Press the yellow button on the right hand side labelled "Start . Stop".

When you record the timed walk it is very important that you do so accurately. The last four digits of the stopwatch will display the time in hundredths of a second e.g. 02.34. Please transcribe this carefully on to the timed walk recording card and from there into the CAPI programme.

### ***Introducing the test***

As closely as possible, follow the instructions in the CAPI programme and this protocol to describe the test and how to perform it correctly. Do not provide any additional encouragement beyond the script provided in the CAPI programme and this protocol.

The detailed instructions and demonstration may seem unnecessary to some respondents. Say that you are going to explain the test to the respondent in detail since this is the best way to make sure that everyone does the test in a similar manner.

### ***Performing the test safely***

Your safety and that of the respondents is paramount in this study. The Timed Walk is a very safe test to perform and has been administered in ELSA Wave 1 and 2 without incident.

Before the respondent performs the test, you will have the chance to assess the safety and the respondent's willingness to perform the test. If you do not believe the respondent is safe then do not conduct the test.

Once the respondent has consented to perform the test, make sure that there are no barriers to safety such as poor lighting, loose rugs, furniture or pets in the way. If possible, and with the respondent's permission, remove any barriers to safety as appropriate. Do not risk harming yourself by moving heavy furniture.

The test may be performed in a hallway or sheltered corridor if there is no suitable space elsewhere as long as the surface and lighting are good and the location is safe and reasonably private. In rare instances where these criteria are met, it could be conducted outside, however it is vital that you avoid dark spaces or uneven floor surfaces. It is strongly preferable to conduct the timed walk on a floor that is level, not carpeted and not slippery (e.g. highly polished). If all the available space is carpeted, choose a floor with the thinnest and hardest carpet.

If the respondent is wearing slippers or high-heeled shoes or is not wearing shoes, ask them if they can change into a pair of low-heeled shoes or trainers. If they do not have a suitable pair of shoes it would be safer for them to do the test in bare feet rather than in socks or tights.

Walking aids (such a stick or zimmer frame) may be used on this test but the respondent should not rely on the support of another person. Continue to record the time the test takes by watching the respondent's feet. That is to say, do not start or

stop counting from the time the walking aid crosses the line. Instead, focus on when the first foot touches the floor, fully across the line.

### ***Demonstrating the test***

Demonstrate the walk for the respondent. Remind the respondent not to begin to do the walk until after you have demonstrated it. It is very important that the interviewer demonstrates each step correctly. Experience has shown that respondents follow more closely what the interviewer does rather than what he or she says. If the respondent indicates that he or she does not understand how to do the test, demonstrate it again rather than relying on repeating verbal instructions. Repeat the demonstration only once. If the respondent still does not understand, skip the test. Do not 'coach' the respondent.

### ***Criteria for an acceptable test***

Please note the following criteria must be met for a measurement to be considered acceptable. If they are not met, the walk should be repeated:

- i) Respondent begins with both feet together at the beginning of the course.
- ii) The interview starts timing when either foot is placed down on the floor across the start line. The *whole* foot must be across the line before the test is started, so if the respondent is shuffling, or puts their foot down so that it straddles the line, start the stopwatch when the *whole* foot has crossed the line.
- iii) The respondent walks and does not race.
- iv) The respondent walks all the way past the end of the tape measure.
- v) The interviewer stops timing when either foot is placed down on the floor across the finish line. The *whole* foot must be across the line before the test is complete, so if the respondent is shuffling, or puts their foot down so that it straddles the line, stop the stopwatch when the *whole* foot has crossed the line.

### ***Safety during the test***

The interviewer should not do the test if the respondent appears to be in danger of falling.

If space allows, the interviewer should stand close enough to the respondent to offer support if he or she loses balance or trips. Ideally, position yourself standing at the respondent's side, slightly behind him or her. If there is not enough room to walk alongside the respondent, for example if you are in a narrow corridor, double-check your assessment that they are safe to conduct the test and stand at the end of the course facing the respondent. You will then be close to the respondent as they turn to start the second test. This is the time when an individual is most likely to need to check their balance. Standing at the end of the course will also enable you to see the respondent complete the test clearly.

If you are walking at the respondent's side, slightly behind him or her, one hand should be positioned close to the respondent (at the hip or waist level) but you should not be touching them. If you find yourself in a situation where the respondent appears to lose

balance, you may want to help them to recover their balance by placing both hands on their trunk. If the respondent begins to fall it is not safe to try to catch him or her. It is more appropriate to attempt to steady them or, if necessary, to slowly ease them to the floor. Do not hold their arm, hold around their body. This will prevent the respondent **and you** from becoming injured.

If the respondent does fall call for help if appropriate, but if they are not injured, help them by first having them get on their knees or on all fours. Place a chair next to the respondent and have him or her support him or herself onto the chair. If assistance is needed, lift under the shoulders; do not hold their arm, hold around their body. Do not try to lift the respondent alone from the floor or put yourself at risk. Remember to seek help if it is needed and to complete a report for any incident of this kind.

If the respondent loses their balance or falls, do not attempt to complete the walking test.

### ***Interviewer script***

The following pages provide an appropriate script. Please try to use the same wording every time you administer the Timed Walk so that all tests are administered consistently between interviewers, over time, and between studies.

When you are ready to complete the Timed Walk select Ctrl- <Enter> and choose Measurements. The opening screen will clarify who should complete the Timed Walk test (i.e. individuals who are aged 60 or older and who are completing an interview on their own behalf).

***(A) First, follow the CAPI screens in Block MM which will help you exclude individuals for whom it would not be appropriate to carry out the Timed Walk.***

***(B) If appropriate, begin to set up and introduce the Timed Walk***

I: "OK, we'll proceed then. I'd like to find a space we can use to do the walk. We'll ideally need 12 feet of space."

*If you cannot find a suitable space or do not feel the space is safe, tell them "It would be safest to skip this test and move on to the next set of questions."*

Ensure that the respondent is wearing appropriate footwear at this point. If not, ask them to change their shoes or to put shoes on.

I: "I'm going to place the measuring tape alongside the space where the walk will take place. This is our walking course. I want you to walk to the other end of the course at your usual speed, just as if you were walking down the street to go to the shops. Walk all the way past the other end of the tape before you stop.

If there is space "I will walk with you. Do you feel this would be safe?"

*If they answer "No" tell them "It would be safest to skip this test and move on to the next set of questions."*

I: "Now I'd like to demonstrate how to do the test. Please don't get up until after I demonstrate the test.

“You will start by lining your feet up at the starting point.”

If there is space say: “I’ll walk along side you the whole time during the test.”

“For the test I’ll say “Ready? Begin” Are you ready to go now?”

Then get the stopwatch ready. Place the card at the end of the walking course.

“Now, I am going to time you as you walk the course. I will be asking you to walk the course two times. I’d like you to stand here with your feet lined up. Start walking when I say “Begin”. “Ready, begin”

*Record the results of the first trial in hundredths of a second, exactly as it is shown on the stopwatch. If the respondent was unable to complete the test or you stopped them because of safety reasons, do not attempt to complete the test. Tell them “It would be safest to skip this test and move on to the next set of questions.” Otherwise, continue.*

I: “Now I want you to repeat the walk. Remember to walk at your usual pace and go all the way past the other end of the course. I’d like you to stand here with your feet lined up. Start walking when I say “Begin”. “Ready, begin”

*For the second trial ensure that the respondent walks back along the course they have already covered. Record the results of the second trial in hundredths of a second.*

**(C) Return to the laptop, enter the data and complete Block MM**

In instances where the respondent did not complete the test, the CAPI programme will prompt you to briefly describe why.

**In all instances, follow the protocol.**

## APPENDIX C – Protocol for Cognitive Module

The cognitive module is very similar to the one used in Wave One (though the numeracy questions and the second prospective memory task have been dropped) so interviewers who took part in the fieldwork during 2002 will have some familiarity with the protocols.

Nevertheless, it is very important that interviewers who worked on ELSA at Wave One refresh their skills by reading this protocol thoroughly and rehearsing the activities during the pilot. This is because it is vital the module is administered systematically in every case and that differences and similarities from Wave One are properly understood. At Wave Two, interviewers will need to be able to administer the tests *and* be able to reassure respondents about repeating the activities.

The great majority of respondents will have completed this test at Wave One and some may be surprised to meet the same questions again. It is important that you reassure respondents that it is a deliberate part of the study to ask people to repeat certain activities at each interview so that we can understand how and when people's circumstances change. One of the tasks will change from wave to wave; the CAPI programme selects one of four word lists for the memory task so that each household member receives a different list and each individual receives a range of lists over time. However a number of the tasks, such as the animal naming exercise and the letter cancellation test, are repeated. Though some respondents may find the task easier on the second or third occasion, and a few may even practice, the research evidence shows that using the same task is still the best way to measure changes in memory and concentration over time.

The following equipment is needed:

- Cognitive Module - Interviewer recording booklet
- Pencil
- Clipboard (if you need a clipboard please speak to a member of the Yellow Team)

### ***Considerations prior to cognitive testing***

Good cognitive testing assumes that the optimal performance of the respondent has been obtained. As a minimum, this means that if a participant normally uses reading glasses or hearing aids, these must be used during testing. It also means that the tests are performed in private i.e. only the interviewer and respondent should be in the room at the time and that the settings should be as free as possible from interruption or disturbance. At the end of the CAPI module you will be asked to record whether or not these conditions were observed. If there are any circumstances which you feel interfered with test performance, please record this information.

### ***Considerations during testing***

The participants should be given encouragement during the testing, but do not give any specific feedback or assistance beyond what is specified in the instructions.

**Please be sure to administer each test exactly as specified.** This includes delivering each test instruction precisely as written. Even subtle departures from the written instructions and procedure can influence the respondent's performance. It is crucial that these tests are performed in a standardised way by all interviewers in order

that we can compare the performance of different respondents in this study and compare our findings with other studies.

**Please note that for timed tasks, precise timing is of crucial importance.**

### ***Debriefing participants***

Following testing, some participants may request feedback about their performance. **Specific feedback should not be given.** You can say “Everybody finds it difficult, you have done fine” but do not say exactly how well they have performed, and never provide the correct answers.

Indeed participants should not be encouraged to dwell on their performance in terms of good, average or poor. For example, it is not unusual for people to be concerned about poor memory performance when in fact their scores are quite good. For participants who need reassurance, it may be helpful to reiterate that the tests are designed to be difficult. In rare cases where the respondent feels genuinely concerned about their performance, they may be advised to discuss their concerns with their general practitioner.

### ***Scoring cognitive tests***

Note that for cognitive tests, “don’t know” responses should be entered as incorrect. In this section the CAPI will not allow you to enter Ctrl-K. This is because experience shows that such responses are usually associated with inability or difficulty in doing the task. Try to encourage respondents to “Just have a go”.

### ***Description of specific cognitive tests (question names in brackets)***

#### Self-rated memory (CfMetM)

This is an indication of whether the respondent is worried about their memory.

#### Orientation in time (CfDatD, CfDatM, CfDatY, CfDay)

Knowing the day and date is a simple but effective test of memory. The respondent will be asked the date and day, you will need to code whether they got the day of month, month, year and day of the week correct. If the respondent does not mention any element of the day and date then you can prompt.

#### Prospective memory instructions (CfProM)

Sometimes referred to as “remembering to remember”, prospective memory concerns memory for future actions. In Wave Two of ELSA we have one prospective memory task (rather than the two included at Wave One). The instruction for this task is given at this question near the beginning of the interview and involves asking the respondent to write their initials at the top left-hand corner of a piece of paper which you will give them attached to a clipboard, with a pencil which you will also give them. The paper that we want them to write on is the third page of the interviewer recording booklet – the page on which they will carry out the letter cancellation task. The CAPI programme will prompt you to attach this booklet, open to the correct page, to the clipboard and hand it to the respondent.

### Word list learning (CfLsInt to CfLisEn)

This is a test of verbal learning and recall, where the participant is required to learn a list of 10 common words.

The respondent will be asked to recall the words immediately and later on in this section of the interview (delayed word list recall).

There are four different lists. A different list will be given to different members of the household and respondents will not be given the same list as they were at Wave One. The computer will decide which of the lists to use.

The list should, if possible, be presented by the computer using a recorded voice. The CAPI program will prompt you to activate a test message to check that the respondent can hear the recorded computer voice and allow you to adjust the volume if necessary. Ensure that the computer voice is not too loud as this produces distortions. If the recorded computer test message cannot be heard by the respondent, please adjust the volume using the instructions on the last page of this document. Please call the help desk if you still have no success with adjusting the volume of your laptop.

If, despite adjustments, the respondent cannot hear the computer voice then you will have the opportunity to read the list to the respondent. The respondent should only hear the list once. You should read the list clearly and at approximately two-second intervals (imitating the pace and clarity of the computer voice).

Please write down, on the first page of the booklet provided, each word that the respondent recalls. The respondent can recall the words in any order. Do not interrupt the respondent. Note that each word in a list starts with a different letter of the alphabet, so if there is not time to write the words in full, you can abbreviate them by writing down the letter with which they start. Take care not to count any words the respondent says which are not on the list (even if the respondent misheard the word). You will be asked to enter the number of words the respondent recalled correctly.

If the respondent mis-hears a word you should **not** count it as correct.

### Verbal fluency – animal naming (CfAniSt, CfAni)

This is a test of how quickly participants can think of words from a particular category, in this case naming as many different animals as possible within one minute. **Only if** the participant asks for clarification, explain that animals include birds, insects, fish etc. If the participant gets stuck, encourage them with “Can you think of any more?”

Respondents are asked to name as many different animals as they can think of in one minute. The timing will be controlled by the computer – you will need to press ‘1’ and enter when prompted to start the test. Write the responses on the sheet provided. **It is very important that the flow of the respondent is not limited in any way.** If the respondent is saying words more rapidly than can be written down in full, switch to a suitable abbreviation such as first letters or a tally. If this is necessary, however, be certain to monitor for repetitions, which do not count towards the total. After one minute has passed, the computer voice will say ‘Stop, now’.

You will be asked to enter the total number of different animal names given by the respondent. Do not count repetitions and do not count redundancies (e.g. white cow, brown cow). Do not count name animals (e.g. Spot, Bambi, or – as was queried in

briefings - Yogi Bear!). However, different breeds (e.g. dog, terrier, poodle) and different gender or generation-specific names (e.g. bull, cow, steer, heifer, calf) each count as correct. If the respondent gives the name of an animal which you have not heard of (e.g. kudu, echidna) give them the benefit of the doubt and count them as correct.

#### Prospective memory test (CfMem, CfMemS)

The interviewer recording booklet, which has been opened to the Letter Cancellation page (see below), will be handed to the respondent attached to the clipboard along with a pencil. At this point the participant should remember to write their initials on the top left-hand corner of the page. The score is based on their ability to do this without being reminded. If they make no response within 5 seconds, you will need to give them the reminder.

**Please make sure you wait for exactly 5 seconds before prompting, since the timing is crucial to this test.**

The respondent can get both actions correct (writing initials, using the top left-hand corner) or get only one action correct (e.g. writing initials in the right-hand corner, or writing their name in the left-hand corner) or neither action correct, before or after a prompt.

The CAPI programme will ask you to record whether the respondent needed a prompt and, after the Letter Cancellation task (see below), whether they wrote their initials, and whether they did this in the correct place.

#### Letter Cancellation (CfLet)

This is a test of attention, mental speed and visual scanning. The participant is given a page of random letters of the alphabet and asked to cross out as many “Ps” and “Ws” as possible within one minute. They need to do this both as quickly and as accurately as possible.

**Exact timing is crucial for this test.** The timing will be controlled by the computer. Do not allow them to start before giving all the instructions. Be sure to make it clear to the participant exactly when they should start. The computer voice will tell them when to stop. You should immediately ask them to underline the letter on which they finished. This means, wherever their eye has reached, **not** the last P or W that they have underlined.

The completed Letter Cancellation task will be scored by ELSA staff. For this reason it is vital that you remember to write the respondent’s serial number in the boxes provided on the **front** of the booklet. You will need to return completed booklets for each respondent who completes the test.

#### Delayed word list recall (CfLisD)

Again, please write down on the sheet provided, each word that the respondent recalls. Note that each word in a list starts with a different letter of the alphabet, so if there is not time to write the words in full, you can abbreviate them by writing down the letter with which they start. Take care not to count any words the respondent says that are not on the list. You will be asked to enter the number of words the respondent recalled correctly.

## APPENDIX D – Additional notes on the CAPI questions

HOUSEHOLD DEMOGRAPHICS MODULE (HOUSEHOLD GRID)	
Question Name	Notes
DhBack	<p>This screen will list the names and person numbers of people who had moved out of the household at previous waves. We need to find out whether they have moved back in so that we can fit them into the household grid.</p> <p>If you find out that any of these people have rejoined the household <b>after you have answered this question</b>, please scroll back up to this screen and select the correct person number, and then press 'END' so you can check their details in the grid.</p>

HEALTH MODULE	
Question Name	Notes
HeFlnt	This question refers to difficulties the respondent may have walking due to a long-term physical, mental or emotional problem or illness. By 'long-term' we mean a condition that has lasted or is expected to last three months or more.
HeEye, Hefrnd, Hepap	You should read out the words in brackets at these questions to prompt the respondent to evaluate their eyesight <b>when using glasses and corrective lens if they usually wear them.</b>
HeOpt	Diabetic retinopathy is the medical term for diabetic eye-disease and age-related maculopathy is the medical term for macular degeneration. As with lots of other health conditions, most people who have these conditions will recognise the terms used.
HeHear, HeHra	You should read out the words in brackets at these questions to prompt the respondent to evaluate their <b>hearing when using their hearing aid if they usually use one.</b>
HeBpchk	We want to learn whether there is variation in the preventive checking of blood pressure amongst people this age and how this influences their long-term health. This question is only asked if the respondent is aged 65 years or over.
HeDiaa	This question asks about cardiovascular disease (CVD) or related conditions. However it is important that you do not use the term 'cardiovascular' as this could lead people to exclude conditions which they have but do not realise belong to this category. Only conditions that have been diagnosed by a doctor should be included here and it is important that all conditions that the respondent has ever been diagnosed by a doctor as having are included here.

	<p>For most of these conditions, there are follow-up questions about age of diagnosis, whether had condition in the last two years and whether currently on medication for the condition. The follow-up questions vary from condition to condition.</p> <p>If the respondent said that they had some of these conditions in their last interview then they will be asked whether they still have these conditions at the questions described above. They will then be asked <i>HeDiaa</i> to find out if they have been diagnosed with any <b>other</b> conditions since we last interviewed them.</p>
HeAga- HeAge, HeAgary- HeAgery	<p>If a respondent told us at Wave 2 that they had a condition (e.g. angina) but did not say the age they got it, they will now be asked how old they were when they were diagnosed with it. If a respondent reports a new condition they will be asked the date it was diagnosed.</p> <p>For all questions which ask for age of diagnosis, encourage the respondent to give an estimate if they cannot recall the exact age.</p>
HeHibp, HeHibpa, Hehibpb	<p>These measures are intended to help us learn about the quality of health care people with high blood pressure are receiving and whether this influences their long-term health over time.</p> <p><i>HeHibp</i> - if a doctor was unable to explain high blood pressure to the respondent, code 'no'.</p>
HeAce, HeAcea, HeDiXb	<p>These questions are also to learn about quality of care amongst people with diabetes. Please be sure you see all the medications that the respondent is currently taking. When you have spotted one on the list of medications, respond affirmatively and stop the process. You do not need to continue looking at medications once you have identified one of those that are on the list.</p>
HeAgf- HeAgk, HeAgfr- HeAgkr	<p>If a respondent told us at Wave 2 that they had a condition (e.g. asthma) but did not say the age they got it, they will now be asked how old they were when they were diagnosed with it. If a respondent reports a new condition they will be asked the date it was diagnosed.</p> <p>For all questions which ask for age of diagnosis, encourage the respondent to give an estimate if they cannot recall the exact age.</p>
HeArta - HeArte	<p>These measures are intended to help us learn about the quality of care people are receiving if they have arthritis and whether this influences their long-term health over time.</p>
HeCanaa	<p>Lymphoma and Leukaemia are types of cancer that start in the lymph glands and blood respectively.</p>
HeFla, HeFlb, HeFlc, HeFrac,	<p>These questions are asked of those aged 65 or older and cover all falls from standing position (including when drunk), fractures and joint replacements.</p>

Heji, Hejiaa, Hejibrh, Hejiblh, Hejibrk, Hejiblk	See below for notes about specific questions in this section.
HeFla	All falls should be included here, regardless of the reason for the fall.
Heiqa - Heiqq	These questions are only asked in proxy interviews and are designed to assess the respondent's level of cognitive functioning.
HePab, HeBck, HeHip, HeKne, HeFet	Respondents who report pain (at <i>HePain</i> ) are then asked to rate their pain in specific parts of the body on a scale of 0 to 10. <b>It is important not to offer any other anchors for the respondent to evaluate their level of pain, other than those provided in the question.</b> If the respondent is uncertain, prompt by repeating the definition of the scale on the screen and encourage them to give a value.
HePac- HePak1	These measures are intended to help us learn about the quality of care people are receiving for knee or hip pain and whether this influences their long-term health over time.
HeAnInt- HeAnk	<p>The questions in this section come from the “Rose Angina Questionnaire” which is recommended by the World Health Organisation for detecting symptoms related to cardiovascular disease. When administering these questions, <b>make no attempt to help the respondent by interpreting the questions.</b> For example, you should not say what you think is meant by ‘pain or discomfort in the chest’. These questions are intended to stand entirely on their own and for the respondent to use his/her own interpretation.</p> <p>If respondents are not sure about the answer please code that they do <b>not</b> have the condition, EXCEPT for at <i>HeAna</i> (see below).</p> <p>Please see more notes below on specific questions in this section.</p>
HeAna	Record <u>any</u> instance of pain. For example, an answer such as “No, except for indigestion” should be coded ‘yes’. The questions that follow are designed to filter out any chest pains that are not related to cardiovascular disease.
HeAnb	The answer must be interpreted strictly. We only want to know about pain when walking uphill or hurrying – not when doing any other activity. Pain experienced only when going up stairs should be recorded as ‘no’.
HeAnf	If the respondent says that when they get pain in their chest while walking they take a tablet (e.g. GTN, nitroglycerin, trinitrin) or use a mouth spray (for the heart and <u>not</u> for wheeze), code ‘1’ (i.e. he/she “stops walking”).
HeAng	If the chest pain goes away after taking a tablet or using a mouth spray then code ‘1’ (i.e. the pain goes away after stopping and taking medicines)

HeAni	Please be as precise as possible in recording the location of the pain, using the diagram as a guide. Be careful about which side is left and which is right. The numbers on the diagram match the numbers that need to be coded at <i>HeAni</i> . The card is designed to be used by you and the respondent together. The respondent should indicate the area of the pain on his/her own body, and together you should work out which part of the diagram it corresponds to.
HeAnk	A severe pain across the front of the chest lasting for half an hour or more could indicate that the respondent has heart problems. However, please do not give the respondent any guidance about what is meant by a severe pain across the front of the chest.
HeRpa- HeRpj	<p>This section deals with wheezing and asthma.</p> <p>In this section do <b>NOT mention the term “asthma”</b>.</p> <p>In this section it is particularly important that you obey the following rules (which apply to most questionnaires most of the time):</p> <ol style="list-style-type: none"> <li>1. The question should be repeated exactly as it appears on the screen. If there is an ambiguity or misunderstanding, repeat the question emphasising the wording, but do not change the wording.</li> <li>2. Try to get the respondent to give a definite answer.</li> <li>3. If the respondent does not understand a yes/no question even after it is repeated, code it as Don't know (CTRL K).</li> <li>4. On other questions, if the respondent does not know the exact answer, get their best guess.</li> </ol> <p>See below for notes on specific questions in this section.</p>
HeRpg	Wheezing can be described as: <i>a whistling sound whether high or low pitched, and however faint</i> . No distinction is made between those who wheeze during the day and those who only wheeze at night. <b>DO NOT MENTION ASTHMA.</b>
HeCda- HeCdf	<p>These questions deal with pain in the leg muscles <i>brought on</i> by walking and are designed to find out in what circumstances the pain occurs, and how long it lasts <i>after</i> the respondent stops walking.</p> <p>See notes about <i>HeCdd1</i> as well.</p>
HeAdla, HeAdlb	<p>These questions are about any difficulties the respondent has with activities of daily living (ADLs). For the first set of activities (<i>HeADLa</i>), only include limitations which are due to physical illness and problems. For the second set of activities (<i>HeADLb</i>) include limitations because of any physical and mental illness or memory problem as well. The items covered include physical activities (eg sitting), mixed physical and mental activities (eg dressing) and mental activities (eg using a map).</p> <p>If the respondent reports that they do <i>not</i> have a difficulty doing a particular item because somebody does it for them, but would have a difficulty if they did it themselves, they should be recorded as having a</p>

	<p>difficulty.</p> <p>Furthermore, if a respondent reports avoiding doing a task because it wouldn't be 'sensible' for them to do it, they should be recorded as having a difficulty.</p> <p>If a respondent reports they do not have a problem stooping, kneeling or crouching, but rather with getting back up, code that they have difficulty (code 6 at <i>HeAdla</i>).</p>
HeHpa	<p>Respondents who report difficulty with any of the ADLs (at <i>HeAdla</i> or <i>HeAdlb</i>) are asked this question. Only practical help received for the activities that they have difficulty with should be included. If respondents sometimes receive help, code 'Yes'.</p>
HeHpc	<p>Only respondents who receive help with any ADLs are asked whether the help they receive meets their needs. This should be the respondent's own subjective evaluation of the help they receive.</p>
HeAid	<p>This question asks whether the respondent uses particular mobility aids or special eating utensils. Only personal alarms (either fixed in the home or mobile alarms carried by the respondent) used to call for help in the event of falls etc should be included in code 7 – exclude other types of personal security alarm such as rape/attack alarms.</p>
HeInct, HeIncta	<p>These questions are about incontinence. Like all potentially sensitive questions, this should be asked in a matter-of-fact way. Include incontinence for any reason.</p>
Heslfc, Heslfcy	<p>This question asks about when the respondent last participated in a diabetes self-management course or class or received special training on how to manage their diabetes. Please include such activities as a 30 minute consultation with a dietician.</p>
HeSkb, HeSkc	<p>Encourage the respondent to give an average of how much they smoke. If s/he cannot and gives a range instead, enter the mid-point of the range (eg 20 to 30 should be entered as 25).</p>
HeActa, HeActb, HeActc	<p>These questions are slightly unusual as although there is a card, the card does not have the response categories on it – you should read these out as in other READ OUT question. The questions are orientated around three levels of activity: vigorous, moderate and mild, which are shown on the card. Each level has a number of examples on the card to 'anchor' the respondent. Allow the respondent to use additional examples, but the respondent, not you, should judge which of the three categories (vigorous, moderate and mild), the activity should go into.</p> <p>You should not include work related activities, these are asked about in the work and pensions section of the questionnaire. Add all activities within a particular category together to provide an estimate of frequency.</p>

**WORK AND PENSIONS MODULE**

<b>Question</b>	<b>Notes</b>
Key terms - job/main job	<p>A job is defined as a period of paid work for an employer or a period of continuous self-employment.</p> <p>If a respondent has more than one job, their main job is the one in which they work most hours. If they work equal hours in both/all their jobs, their main job is the one which is highest paid. The first section of this module is primarily concerned with collecting information about a respondent's main job.</p>
WpAct	Note that at this question we only want to know about activities in the last month. Retired people will be able to have the fact that they are retired recorded at the subsequent question <i>WpDes</i> .
WpAct, WpEdC	Include only formal educational courses, do not include, for example, learning using TV courses or language tapes.
WpAct, WpVW	By 'voluntary work', we mean any kind of unpaid work, whether formal (e.g. one day a week volunteering for the local charity shop) or informal – helping out at a village hall or on a committee etc.
WpAway	This question is asked to everyone who does not report doing any paid work or self-employment in the last month, regardless of their age. This is because we do not want to rule out the possibility that people over age 65 may be looking for work.
WpDes	Note that we are interested in respondent's self-defined status here – the standard rules that normally apply to classification questions DO NOT apply here.
Wpjob, Wpjobl, WpStj, WpEmp, WpEver,	<p>This section is heavily filtered depending on answers given at previous interviews. There are 5 different routes into this section.</p> <ul style="list-style-type: none"> <li>• Respondents who are not in work now and were not in work at their previous interview, will be asked whether they've had a job in between. If they have, they will be asked the standard classification questions about this job.</li> <li>• Respondents who are not in work now but were in work at their previous interview will be asked whether the job they told us about then was their most recent job. If it was, they will not be asked the standard questions about this job UNLESS the information they gave us was incomplete. If they've had a different job since, details of this job will be collected.</li> <li>• Respondents who are in work now and were in work at the time of their previous interview, will be asked whether the job they were doing then is their main job now and, for employees, whether they are working for the same employer. If so, then they will not be asked the standard classification questions UNLESS the information they gave us at their previous interview was incomplete. If their main job now is different to the one they told us about at their previous interview, they will be asked details about their main job.</li> </ul>

	<ul style="list-style-type: none"> <li>• Respondents who were not interviewed at Wave 2, Wave 1 or HSE and are not working now, will be asked if they've ever worked and if so, they will be asked for details about their most recent job.</li> <li>• Respondents who were not in work at the time of their last interview but are working now will be asked about their current job.</li> </ul>
Wpsal, WpCjb	All respondents who are currently in work (as well as those for whom we are collecting full job details) will be asked these additional questions about their status in employment. As the labour market is becoming increasingly complex, the distinction between employees and self-employed is becoming less clear – these questions are designed to classify people more precisely into these groups.
WpNoE	This question will be asked to all current employees and may be asked in addition to the standard question on workplace size. This is about employer rather than workplace size and is necessary as rules governing some pension schemes depend on the total number of employees a company has.
WpJAct	Note that at this question there are examples on the screen, but not on the showcard, that you can use to prompt respondents if necessary. We want them to answer about the work that they do most of the time in their job – even if this is different to their 'official' job description.
WpJobsM	At this question (and many others where we ask for months) if the respondent does not know the month ask them for the season. Winter (start of year) is Jan/Feb and Winter (end of year) is Dec.
WpCjob	Here we are asking about the type of contract the employee is on, not the type or duration of the job. Shorter term contracts are commonly thought of as being causes of job insecurity, even though they may often be renewed once the contracted term expires.
WpWlym	We want the total number of weeks in the last year they were in employment at this question – which in most cases will be different from the number of weeks they worked. Periods of paid leave should be included, for example teachers who are paid over the summer holidays should count these weeks. Similarly if a respondent was employed part-time for the whole of the last year they should answer 52. For the self-employed, we want to know the number of weeks they were 'actively self-employed', this means the number of weeks in which they spent some time carrying out any activity pertaining to their self-employment business or trade.
WpWly	Casual jobs/employment should not be included here.
Wpllly, WplljM	At this question we want the date the job ended – which may be

	different than the date the respondent stopped work in the job – for example they may have stopped work and then been on leave/off sick etc for a period before the job ended.
WpNIC, WpNICe	The distinction between paying national insurance contributions yourself and having them paid on your behalf is that contributions may be paid on the behalf of those individuals who are looking after dependants or are on certain benefits and currently looking for work.
Wpthl	Only code 'yes' here if their most recent pay is significantly different to their usual take home pay – if the difference is within five pounds, there is no need to collect their usual pay as well.
WpIR-WpBusV	For those that don't file accounts we just try to capture some measure of what their income was in the past year. This will only be an approximate measure, but we do need to compare how well off such people are compared to the rest of the population. For these groups, income could be thought of as what you would have received, all things considered, had you been doing the same job for someone else who had paid all the expenses and outgoings you may have incurred. By the 'worth' of the business we mean the value the individual could expect to get for it if they sold it to someone else.
WpMoJ	This question will be slightly different depending on whether the respondent is in work or not. We want all respondents to include any kind of casual work they may do from time to time here but for those in work, we also want them to include any formal second jobs they have here as well.
WpERet, WpErAg	Many employers offer older workers attractive incentives to take early retirement. We are interested in whether respondents who are still in work have been offered such arrangements since these are a very common influence on the decision to retire early.
WpPrev	We have designed a new grid for previous pensions. The program will work out whether these are current or past schemes, and the follow-ups will depend on this. You also have the opportunity to add new schemes into the grid.
WpBPS	For those employees who are not in an employer pension scheme, it is important for us to identify whether or not this is because the employer doesn't offer a scheme or because they are not eligible to join the employer scheme or because they chose not to join their employer scheme.
Pentype	All these pension types, apart from employer provided schemes, are very similar: <ul style="list-style-type: none"> <li>• Personal Pensions are individual contracts with a pension company.</li> <li>• A group personal pension is similar, but everyone in the same</li> </ul>

	<p>job or workplace tends to have a pension contract with the same company.</p> <ul style="list-style-type: none"> <li>• Stakeholder pensions are less likely to come up in this sample. They are the new low cost pensions introduced in 2001 by the government. They are like personal pensions and the employer has to offer all its employees a provider so they can join the scheme if they want.</li> <li>• S226 plans are simply personal pension plans for the self-employed. These have been around for longer than since 1986 though.</li> </ul> <p>All the above pension schemes are Defined Contribution schemes These are often called money purchase schemes, and will usually be held through a financial company such as Equitable Life, or Scottish Widows etc.</p> <p>Employer provided pension schemes can either be money purchase/defined contribution (DC) schemes which are similar to personal pensions or defined benefit/final salary schemes (DB) which operate in a different way (see below).</p> <p>There are similar follow-up questions for all types of schemes. Respondents with private personal pensions, group personal pensions, stakeholder pensions and retirement annuity schemes will get the same follow-up questions. Those with S226 plans (self-employed personal pensions) will get slightly fewer follow-up questions. Respondents with employer schemes will get different questions depending on what type of employer scheme they have (see below).</p>
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WpDPS, WpPDes	<p>This is a key question that separates the out two different types of employer pension. We need to know whether the employer pension is an individual fund that works similar to a mutual fund or investment fund and in the same way as a personal pension (Type A - defined contribution or money purchase) or whether it depends on final salary &amp; years of service (Type B - defined benefit or final salary scheme). Most traditional employer or company pensions are in the latter category.</p> <p>It is crucial that these questions are answered correctly. If they are not, some of the subsequent questions about the pension fund will not make sense. For example, in the case of the latter we ask about the number of years of service and the way in which final entitlements are calculated whereas in the case of the former we ask for the current value of the accumulated fund.</p>
WpName	<p>The rules by which pension schemes are run are published by the Government, and by knowing the name of the scheme we will be able to match in the rules for each respondent. Importantly, if the respondent is in a public sector scheme such as a local authority or police force pension scheme we need to know which area it is, since different areas are run differently.</p> <p>Here we need to get as much information as possible to facilitate the link to the scheme data held by the Government, so record as much of the information the respondent can give, since it will help us code the answers more accurately.</p> <p>EXAMPLES:</p> <ul style="list-style-type: none"> <li>• British Telecommunications PLC BT Pension Scheme</li> <li>• J Sainsbury PLC Pension Scheme</li> <li>• Post Office Pension Scheme</li> <li>• Unison Staff Pension Fund</li> <li>• London Borough of Haringey superannuation fund</li> <li>• University Superannuation Scheme</li> <li>• Royal National Institute for the Blind Retirement Benefits Scheme</li> <li>• Scottish Mutual personal pension plan</li> <li>• Equitable Life personal pension.</li> </ul>
WpCos	<p>It is important to establish whether they are contracted-out of the state scheme since this will be important in the calculation of their total pension entitlement. 'Contracted out' means that their National Insurance contributions, which would otherwise have been diverted into the State Earnings Related Pension Scheme, are instead paid into their private pension as well as the respondents own contributions or those of their employer.</p>
WpYbs	<p>Some pension schemes are transferable between jobs – we want to know the number of years the respondent has been in their current pension scheme, not only the years they've been in the scheme with their current job. For example, teachers may have</p>

	changed jobs but stayed in the teacher's pension scheme.
WpErc	Some employer schemes may require scheme members to make contributions, other do not.
WpACon, WpMMin	<p>Members of employer schemes who are required to make a minimum contribution, are asked if they make any additional contributions to their scheme.</p> <p>Those with Defined Benefit (Type B) schemes may make additional contributions in 3 different ways.</p> <p>Additional voluntary contributions (which are known as AVCs, so you should read this out in the question) are when you pay extra percentages of your salary in return for getting more pension rights.</p> <p>Added rights are the same, but you buy them by the year – i.e. you buy an extra year at a time, as opposed to paying x% and getting whatever fraction of the year that will buy you.</p>
WpYcAmt	Members of employer schemes who are not required by their employer to contribute, are asked how much they do contribute to their scheme. It is possible that they may not contribute, for example if the employer makes contributions on their behalf.
WpECon	In most employer-provided pension schemes, the employer will make a contribution to the scheme member's pension. Respondents with more than one employer should answer this question about the employer who provides the scheme they are answering about.
WpNRA	Most employer pension schemes will have a Normal Retirement Age which is the age at which scheme members are normally able to retire and draw pension benefits. Some may have a period of service after which time members can retire. Some schemes may have both an NRA and a period of service.
WpEra	Some pension schemes may have a standard early retirement age. Other schemes may periodically or occasionally offer early retirement 'windows' to scheme members.
WpDesP	This just asks how the final salary benefits for the pension will be calculated – when a respondent gets 2/3 of their final salary how will this 'final salary' be defined? Three of the most common options are listed as response categories but there may be others (average of last three years, etc...).
WpFsap	The most commonly used fractions are given as answer categories on screen. If the respondent says they don't know it may be worth prompting gently with these examples as this may help trigger their memory - but be sure not to lead the respondent and record don't know if necessary.

WpFSav	All respondents with Defined Benefit (Type B) employer schemes will be asked if they make Free-standing additional voluntary contributions (FSAVCs). These are less common than AVCs but respondents that are making them will know what they are. They are like AVCs but the contribution goes into a separate pension instead of into the same pension.
WpCons	This question asks for consent to contact the employer to find out more about the rules of the pension scheme – note that we will only be asking about how the scheme operates for <u>all</u> employees. We will not ask about the respondent's contributions to the scheme or disclose that they have taken part in the study.
WpAPF, WpCuv, WpCB	Respondents with defined contribution (Type A) employer schemes or any kind of personal pension will be asked the current value of their pension fund. This is important because it tells us how much they have put in over the past and is a good guide to how much they will receive once they retire.
WpPCont	Respondents with personal pensions may never have contributed to their pension scheme (but had contributions made on their behalf by an employer), they may be contributing regularly or irregularly or they may have stopped contributing to their pension scheme.
Respondent's own and employer contributions to pension schemes	<p>Generally you should find that respondents are quite knowledgeable about their own pension contributions but may be less so about employer's contributions.</p> <p>Answers may be given in amounts or as a percentage of salary. In employer provided schemes the amount the employer contributes might depend on the amount the scheme member contributes so this can be given as a percentage of the scheme member's contributions.</p> <p>For respondents with more than one pension scheme (who will usually have more than one employer), the questions about the 'employer' contributions to their second scheme will usually relate to their second/subsidiary job as opposed to the main job.</p>
Expected pension income (WpPtp, WpPtoP, WpPExp, WpLpe)	<p>One important determinant of respondents' working and retirement decisions will be the amount of pension income they themselves expect to get when they retire, on top of anything they might get from the government. In these questions all respondents can answer either with an annual amount, those with defined benefit (Type B) employer schemes can give a fraction of their salary just before they retire and those with defined contribution (Type A) employer schemes or any kind of personal pension can give a total amount that their pension will be worth.</p> <p>There is no right or wrong answer here, we are purely interested in how much they expect to get. Note that we are asking for an amount in today's prices, i.e. ignoring the effects of inflation.</p>

WpInfo, WpInfS	These questions will be asked about all current pension schemes.
WpInfo	Respondents who are currently receiving a pension will be asked whether they felt they needed more information about how much they would receive. This will help us to measure whether or not their income in retirement is what they expected to get.
WpERet	Note the very specific meaning of the term 'early retirement' at this question. For schemes which had a period of service rather than a normal retirement age – the questions should be interpreted as meaning: did they retire before they had completed the period of service in their scheme?
WpReas, WpMRRe, WpRRRe, WpMRRe, WpWkR	The ages at which people are retiring are becoming much more diverse, and the way in which people are moving into retirement is becoming more complex. These questions are designed to find out the role of negative (push) and positive (pull) factors in determining retirement outcomes, and establishing whether retirement was a choice or not. In particular, we are interested if respondents who give 'reached retirement age' as their main reason for retiring were given the opportunity to work past retirement age.
WpPHI	By private health insurance we mean things like BUPA – where you get private health care if you get ill. Dental and friendly plans, which just cover teeth and glasses respectively shouldn't be included.

#### INCOME AND ASSETS MODULE

Question	Notes
IIANow	At this question you are given the chance to skip this section, by coding 'no'. If you do this you must make sure you come back and complete it at a later time/date, when you should change your answer to this question from 'no' to 'yes'.
IIAWho	<p>If this section is being asked once about a couple who share finances and you have not already coded in the household grid who should answer this section on behalf of the couple, you will be asked to code who the questions will be addressed to.</p> <p>You will not be able to complete the section if the person you code here (or the person who was coded in the household grid as answering these questions), has been suspended. If the respondent has been suspended and is unwilling to finish the interview at a later date, you should change what you code here or in the grid and complete the section with the other member of the couple.</p>
laWork	Because we are interested in incomes over the last year, if the respondent has been widowed in the previous twelve months, it is important that we take into account any income that their spouse may have had during that time. For respondents in this situation,

	<p>the introductory wording to this question explains this to them. For this reason, many of the subsequent questions in this module will refer to “you and your husband/wife/partner” even though their spouse has died.</p>
laSPen	<p>This refers to the total state pension that the individual receives. Depending on the age and the circumstances of the individual it could include combinations of basic state pension, minimum income guarantee (formerly known as income support for pensioners), SERPS (the State-Earnings Related Pension Scheme also known as additional pension) and graduated pension. Since the majority of individuals may not know which of these they are getting we are only after the total amount received.</p>
laPAm, laPPAm	<p>If the respondent does not know how much state pension they receive because it is paid along with state benefits, they should answer the total amount they receive here and enter 99997 at the benefits questions which will indicate that the amount they get has been counted elsewhere. It’s crucial that the amount they receive is not entered twice as this would mean we will over-estimate their income.</p>
laPPen	<p>This refers to any non-state pension income, i.e. company or employer pensions, Personal Pensions or self-employment (S226) pension plans.</p>
laAnIn	<p>This refers to all other forms of annuity incomes apart from pensions. Annuity arrangements are where an individual gives a financial institution a sum of money, and in return the institution agrees to pay the individual a certain income for the rest of their life. Note that this definition is on a help screen in the CAPI program.</p>
lahdb, laBeB (and follow-up questions)	<p>Since it is easier for respondents to recall benefits in the period in which they are paid than to add it up over the year, we ask benefits separately for each individual, and separately by each benefit. As with state pensions, we need to know if they started to receive it in the last year and if so, which month. Most individuals should only be in receipt of very few of these benefits. Since we are interested in income over the whole year, however, even if they are not currently getting the benefit we also need to know whether they have got it at any point during the past year and if so, how much they got and for how long.</p> <p>The pension credit came into operation on the 6th October 2003. This benefit replaced the Minimum Income Guarantee (MIG) and it can only be claimed by those over 60.</p> <p>A number of checks are used at this question depending on which of the two benefits that the respondent says they have received. This is to because the Pension Credit is more generous than the MIG for some people, so it is important that we collect the amount received under both schemes.</p>

laA	<p>If the respondent is currently receiving more than one benefit and they are paid together, they may not know how much they are getting from each one. If so, the total amount received for all benefits should be entered at the first of the 'amount' question and 9997 should be entered when asked amounts for other benefits. This way we will know that we have recorded their total benefit income.</p> <p>In this situation recording the information this way, is preferable to entering 'don't know' for all of the 'amount' questions. Similarly, if the amount of the benefit has already been counted along with state pension income, you should enter 9997 here.</p> <p>So, if the respondent is unable to give all the component parts of their state pension and benefit income, the most important thing is to get the total amount they receive and not to enter the total amount they get in more than one place.</p>
laFuel	All respondents aged 60 and over are eligible for a winter fuel payment regardless of income although they do need to actively claim it if they are not receiving the state pension. There should only be one per household though.
laFAInt	For couples who keep their finances separately and are therefore both answering this section on their own behalf, there will be an instruction here for them to include only assets held in their sole name. This instruction applies to all the asset and debt questions. There will be a question at the end where they can tell us the net value of any shared assets that they might have.
laSi	Although the distinction between current and savings accounts is becoming increasingly blurred, a current account is an account used for everyday purposes which typically pays no interest, or only very low interest on balances held. In contrast a savings account typically pays higher interest and is not designed to be used for everyday transactions (even though it may be instant access).
laSava	If a respondent has both a current and saving account, but their current account is overdrawn, we just want the positive amount in their savings account here i.e. we don't want them to give the amount in their savings account minus their overdraft. Similarly, if the respondent just has an overdrawn current account, they should enter '0' here. We will ask for the amount of their overdraft later in the module.
lalsa	Respondents may hold cash, life insurance and/or stocks and shares in their ISAs.
laIP, laSSS, labg, lauit	Here we are interested in the respondent's assessment of what these are worth currently, once any costs associated with selling them, or anything outstanding that is owed on them, has been met. That is, how much you would get, net of any costs or repayments, if

	you sold them today.
laShTyp, laDeNat, laDeMut, laDen, laDem	<p>Many people who own shares only own shares in former nationalised industries (BT, British Gas, Railtrack, etc.) or in former building societies or mutual societies (Abbey National, Halifax etc.) which have 'demutualised'. By 'demutualised' we mean when mutual societies floated on the stock market and gave, or sold, shares to their former account holders.</p> <p>We are interested in separating out these shares from other types of shares and finding out whether they bought or received all or some of these shares at the time of privatisation/demutualisation, as a way of identifying how 'connected' individuals are to the stock market as a method of investment. Similarly, some people may have previously bought/received shares in privatised industries/demutualised societies.</p>
laSick	This screen displays a summary of the information you've entered about the value of the respondent's financial assets. This is primarily to avoid keying mistakes – e.g. entering an extra '0' by accident. Please check this yourself and query/correct any which seem incorrect.
laLiW, laSC	There are two types of life insurance in the UK. One type is pure insurance – i.e. the individual gives a company money each year. If that individual dies the company pays money to their dependents but if they don't die (before a certain date) the company just keeps all the money. The other type of life insurance has a savings component so even if the individual does not die before a certain date they will receive a sum of money (typically the value of a fund) on that date. The questions here are designed to get at both types of life-insurance since we need to know both separately. Note that the second type is exactly the same as an endowment mortgage, although we do not want them to count their endowment policies here since we will be asking for them in the housing section.
laliya	This should include any insurance policy that pays out on death.
laprop	This question asks about real assets. Note that only farm or business property should be included here - we have already collected the value of any businesses they own at the section on work and pensions.
laregp	All kinds of regular payments from non-household members should be included here, apart from any (such as wages, benefits, pensions etc) that have already been asked about.
ladebt, ladebm	Respondents should only say that they currently owe money on credit/store cards if the outstanding balance after the last monthly payment was made was greater than zero.
laJnt	This question will be asked to both members of a couple who keep their finances separately (and so are each answering the income

	and assets module on their own behalf). Any joint assets they have APART from their current home should be included here. Information about their current home will be covered in the housing section.
IAPK	This refers to any other regular payments the respondent receives. If received a large gift from someone then record in 'other'.
IAFcon	This question aims to capture how people manage their money even if they only have a little amount to manage.
lapayw, laearn, larec, laom, laomm	In households which include adults who are not eligible for interview, some summary questions about their income from work and other sources and their assets will be asked to one eligible respondent in each household. We understand that some respondents may be reluctant to answer these questions but it is important for us to ask them as household income is an important source of resources. In order to understand household poverty and inequality we need a household measure of income that includes anything that other adults may earn.

#### HOUSING AND CONSUMPTION MODULE

Question	Notes
IHoNow	At this question you are given the chance to skip this section, by coding 'no'. If you do this you must make sure you come back and complete it at a later time/date, when you should change your answer to this question from 'no' to 'yes'.
IHoWho	If you have not already coded in the household grid who should answer this section, you will be asked to code who the housing and consumption questions will be addressed to. You will not be able to complete the section if the person you code here (or indeed the person who was coded in the household grid as answering these questions), has been suspended.
HoBas	This question will be asked about all adults household members who are not named as householders at HoWho/HoWhN (or married to/cohabiting with a householder).
HoTenu, HoTenuN	This question refers to the tenure of the householder i.e. the person/people in whose name it is owned or rented. This will usually be the person answering the module or their spouse/partner. It may however, be another household member not eligible for interview or a non-household member. If this is the case, there will be very few follow-up questions about housing circumstances.
HoMove	At this question we want to know the earliest year in which a current member of the household moved to the accommodation.

HoAdpt	All respondents are asked whether their accommodation has been modified in any way to assist people with physical impairments, record any of the features present even if not used by the respondent.
HoRtb, HoRtbe	We are particularly interested in knowing whether the respondent bought their home or has ever bought a home through the right to buy scheme. This was most commonly used in the eighties when Mrs Thatcher's government introduced the scheme to allow people to buy their council houses.
HoMSam	<p>For respondents who are in the same accommodation and held at least one mortgage at Wave 2 and still own housing with a mortgage, we want to update the information about mortgages. Most respondents will not have changed their mortgage arrangements but we still need to update the information about repayments and number of years left to run as these may have changed.</p> <p>HoMSam brings up a list of previous mortgages that the respondent told us about and asks them whether they still have this mortgage. If only the number of years left to run has changed enter yes.</p> <p>If respondents have made arrangements to borrow more money using this mortgage, also code yes as we will collect information on this at the next question.</p> <p>There may be some cases where the respondent had more than one mortgage at Wave 2 but we cannot distinguish between them because they were the same type (repayment, endowment etc) and had the same number of years left to run. In these cases, it doesn't matter in which order the details of these mortgages are collected. The important thing is that the details of each mortgage are updated.</p>
HoMNew, HoMNUse, HoMNRas	<p>Here we are interested in completely new mortgage arrangements. Again we ask respondents why they took out the new mortgage. One common thing that people do is to replace their existing mortgage with a different mortgage (perhaps to take advantage of a lower interest rate or more flexible repayment options for example). In this circumstance, you should code No at HoMSam and yes at HoMNew.</p> <p>In some circumstances, paying off the existing mortgage will be the only reason for taking out the new mortgage and this can be coded at HoMNUse. In other circumstances, respondents may have borrowed additional money for other uses and this is also asked at HoMNUse.</p>
HoMMis	This question asks about any other mortgages that they have which we have not asked them about. This question is intended as a check only, as all mortgages should have been picked up by

	previous questions.
HoOutM	This question is asked of movers or people who did not hold mortgages last time. Most people will only have one or two outstanding mortgages or loans. We will collect details of up to five outstanding mortgages or loans.
HoMTy	<p>Interest-only mortgages are where the mortgage holder pays only the interest, and will need to find some other way of paying off the amount borrowed when the mortgage expires</p> <p>Equity release schemes are NOT types of mortgages or loans (see below). However, some people may mistakenly think that they are and if they give this answer you can code it here.</p>
HoRmo, HoEvRe, HoOrm	There are two different ways in which people can re-mortgage their home. They can either add to a re-mortgage element to their original mortgage or they can take out a separate additional mortgage. If a respondent has more than one outstanding mortgage or loan, we know that one of these must be a re-mortgage. Respondents with only one outstanding mortgage or loan may tell us that this includes a re-mortgage. Those respondents with only one outstanding mortgage which does not include a re-mortgage, will be asked whether they've ever re-mortgaged their home. Respondents who own outright will also be asked if they ever re-mortgaged their home. We are interested in whether people have ever re-mortgaged because the issue of how individuals use their housing wealth as they get older is a fundamental one for the analysis of wealth and poverty amongst the elderly.
HoRInc	<p>This question asks about equity release schemes. This is where someone who owns their house outright signs over the ownership of the house, in return for receiving a lump sum and a flow of income payments to be made until they die, as well as being allowed to live in the house until they die. It is sometimes called a reverse mortgage, or a home reversion plan. Whilst still relatively rare, it is rapidly becoming more common amongst this group. It is also possible for people who are still in the process of buying their home to have taken out one of these schemes.</p> <p>It is possible (although unlikely) that respondents who had taken out an equity release scheme at Wave 2, have raised more money in this way since then. This may be because of an extension of the previous scheme or a completely new scheme. For those who had an equity release scheme at Wave 2, this question asks whether any additional money has been raised in any of the ways on the showcard.</p> <p>For those who have raised additional money since Wave 2, the questions which follow sometimes ask specifically about the money that has been raised since the last interview and others ask about all the schemes that a respondent may have.</p>

HoCTB	Council tax benefit or rebate is a means-tested benefit and should not be confused with discounts (for example, single person discounts), which are asked about separately at HoDisc.
HoRet	<p>This question asks about retirement housing. Retirement housing is intended specifically for older people, and usually residents need to be at least 55 or 60. The housing tends to be in a scheme or court of between 20 and 40 flats, or sometimes bungalows. Usually, the housing provides some support for residents but the services provided in retirement housing can differ considerably from scheme to scheme. There are sometimes communal facilities such as a shared lounge or laundry. Residents do not have to be of ill health to live in retirement housing.</p> <p>This is ask or code. Respondents will usually know if they are in retirement housing so if they are unsure then this is unlikely to be the case and therefore code 'no'.</p>
Hohave, HohavB	<p>Hohave asks about durables the respondent may have. The following question will ask which of the durables were bought in the last two years and how much they were. If respondents have a package of a few of the items, code all of the items in the package at Hohave and HohavB, but at Hohv, code the total amount at the first durable mentioned and code 9997 for the other items in package.</p> <p>If there are communal durables, code them at Hohave but do not report them at HohavB.</p>
HoFood	Only if asked, mention exclusion of cleaning products as we need to keep comparability over the waves.
HoOHea, HOFuel	Forms of heating are only to be coded if actually used as opposed to just having them available in the home and not used.
HoGPay, HoEpay	Code other forms of payment in 'other'. Some people pay regularly but not by direct debit and this should be coded in 'other'.
HoCC - HoVnew	These questions ask about the respondent's car(s). In many instances you will be confirming that they have the same car as the previous wave but sometimes you will be entering new car details.
HoVow	If details were entered incorrectly last time but they still have the same car, code never had vehicle and enter correct details.
HoVAg	Note that there are different ways in which the age of the vehicle can be recorded. For all vehicles, the year of registration may be given. For all cars with personalised or cherished number plates you should collect the year the vehicle was registered.
HoRmov	If respondent has moved house since the last wave, they will be

	<p>asked for their reasons for moving. Code 4 (Moved to a more suitable home) is referring to the physical aspects of the building such as being smaller, larger or having special adaptations. In code 12 (Other financial reasons), code any financial reason other than evictions or repossession, e.g. concerning the house running costs or for the purpose of freeing up monies.</p> <p>Code 4 of HorMova (More suitable given respondent's health problems) is referring to physical aspects such as the new home being a bungalow or having special adaptations eg wide doors, ramps, alarms or special taps.</p>
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EXPECTATIONS MODULE	
Question	Notes
ExRain-ExSMA	<p>For all these questions it may be necessary to reassure respondents that there are no correct or incorrect answers, and encourage them to give a response even if they feel they must generalise.</p> <p>Respondents can select any number from 0 to 100, not just those marked on the card (0,10,20).</p>
ExRain	In this example question, you should only read out the additional instructions in brackets if the respondent is having problems understanding how they are supposed to answer the question.
ExLo80	The age given in this question will be adjusted according to the age of the respondent.
ExPW	This question is asked to women aged under 60 (for whom question will refer to age 60) and men aged under 65 (for whom question will refer to age 65), including those not currently in work. These ages have been chosen as they are the state retirement ages.
ExHLim	This question is only asked to those currently in work aged under 65.
ExAlnh, ExClnh, ExInhe	These questions are about expectations of receiving an inheritance. For all of these questions, property or valuables should be included, though respondents are only prompted to include them at the first of these questions. These questions start with the expectation of receiving any inheritance, then ask about increasing amounts of inheritance.
ExCin, ExCain, ExCpln	These questions are about expectations of giving an inheritance. Again property and valuables should be included at all questions, though respondents are only prompted to include them at the first of these questions. These questions start with inheritance of £50,000 and, depending on their answer, respondents are then

	asked about the chances of leaving any inheritance or an inheritance of £150,000 or more.
ExHva	<p>The wording of this question will be randomly altered – a quarter of respondents will be asked ‘increase by 5%’, a quarter will get ‘increase by 10%’, another quarter ‘decrease by 5%’ and the final quarter ‘decrease by 10%’.</p> <p>If the respondent does not own their house, you should code 997. They should answer about the property you are interviewing them in – not any other property they may own. If this property is not a house (e.g. a flat), they should answer about their flat. Expectations about housing value are important as for most people their home is the most valuable asset they own.</p>
ExPlan	If the respondent is unable to give an answer from the card, you should probe for the reason they are not able to do so and choose the appropriate ‘Spontaneous’ code.

#### PSYCHOSOCIAL MODULE

Question	Notes
PsCedi	These questions ask about the respondent’s feelings over the past week – they should answer about the past week even if it wasn’t a ‘typical’ week.
PsCedA-PsCedH	These questions take a slightly unusual form, so you may have to use the prompt for the first few until the respondent learns how we want them to answer. For each question, we want them to say ‘yes’ – if it’s true that ‘much of the time in the past week they... - or ‘no’ – if it’s not true that ‘much of the time in the past week they .... These questions are designed to measure depressed mood.

#### FINAL QUESTIONS MODULE

Question	Notes
FqEthn-FwCultO	Note that the ‘cultural background’ questions can be multi-coded.
FqMqua, FqQual	If we have asked about a respondent’s qualifications at a previous interview, he/she will only be asked to report any further qualifications they have obtained since then.
FqAddr	This question asks respondents to give a stable contact address, if they have not given us one previously. As we will be going back to this sample, we would like as many respondents as possible to give us a contact/stable address. Some people may be reluctant to give a contact address as they are sure that they are not going to move. However, as people’s circumstances can change unexpectedly, try to encourage respondents to give an address. Write the details of the contact on the ARF in Section G.

	<p>You are able to code at this question that the respondent does not wish to be contacted again. Obviously we wouldn't want you to offer this as an option and please only to use this code if the respondent is adamant that they don't wish to be contacted again. Try to avoid having to code this by re-assuring that they can tell the interviewer in 2 years time that they don't wish to take part then if they still feel the same way at that time.</p>
FqStc	<p>Many respondents gave a stable contact address at Wave 2. The program will ask you to check the details are still correct. Please look on the coversheet for full details and check with the respondent. If they have changed, or were incomplete/incorrect, write the (new) details on Section G of the ARF.</p>
FqProx	<p>This question will be asked in all non-proxy interviews. It is important to the study to keep as many of our sample in the study as possible, and this means collecting as much contact information about them as possible. We want to ask respondents to nominate a close relative or close friend who could act as a proxy in future years if necessary. This is likely to happen in the following circumstances:</p> <ul style="list-style-type: none"> <li>– Respondent becomes physically or mentally incompetent</li> <li>– Respondent moves into a residential home and becomes physically or mentally incompetent</li> <li>– Respondent dies and needs someone to complete an End of Life interview</li> </ul> <p>The proxy interview does not disclose any sensitive information that the respondent has told us in previous waves to the proxy informant.</p> <p>There will be no feedforward data in the End of Life interview. This interview covers health, work activities and settlement of estate issues.</p> <p>Please be as clear as possible to the respondents so they understand what the nominated proxy will be required to do. You are able to code at this question that the respondent does not wish to be interviewed by proxy – obviously we wouldn't want you to offer this as an option and please only to do this if the respondent is adamant that they don't wish anyone to answer on their behalf.</p>
Titl, Addr, Tel, Email	<p>As we will be contacting the respondents again, it is very important that the contact details – title, name, surname, addresses and telephone numbers – are accurate. If the details we have already i.e. those that are printed on the ARF labels and coversheet, are correct there is no need to write them on the ARF/enter them in the Admin. However, if they are incorrect in any way, please be sure to make these corrections on the ARF and then enter them in the Admin block. For all new partners and new addresses, you will need to record full details of their title/name/surname and the full</p>

	address and phone number. We want to collect their email addresses both as a way of keeping in touch and because it is interesting in itself to know which of our respondents have email accounts.
FqHelp	As we do not ask directly about literacy problems, please record this here if appropriate.

14. GENERAL	
Who [1], Who [2]	<p>At the end of the section on work and pensions, you will be given the opportunity to abort/suspend one or both of the people in the session. Obviously, we hope that this won't be necessary in many cases and that once a person has begun the interview they will complete it. However, it is possible that someone might refuse to continue part way through the interview or that someone might be called away unexpectedly.</p> <p>If you are interviewing someone on their own or both the people in the concurrent session refuse/are unable to continue, you can exit the questionnaire as normal. However, if you have set up a concurrent interviewing session and one of the two people you are interviewing refuses/is unable to continue, then you can choose to suspend/abort them at this point by choosing code 2. If one person drops out before this point, you should continue asking the questions to the person who remains and enter CTRL-R at the questions for the person who has dropped out up to this point.</p> <p>For any people you suspend you should attempt to go back and complete the interview from where they stopped at a later date (NB – you won't be prompted to do this). You can un-suspend them by changing code 2 to code 1 here but remember that if they have not answered some of the questions before this point, you should ask them these questions too. Note that when you do this, you will need to key over the answers given by the other person in the session who has already completed their own interview. Be careful not to overwrite these answers.</p>
RemindA, RemindB, RemindC	You will be prompted to do the measurements section (if needed and you haven't already done it) after Social Participation, before Cognitive Function and at the end of the interview. After doing the measurements interview, when you re-enter the main interview, to get to the point you were up to, just press END.
WhoSo	Before the section on Cognitive Function, you will be asked to code whether anyone else was in the room during the interview up to this point. Note that this means other than the respondent or respondents allocated to the interviewing session. So, for example, if you are doing a concurrent interview with a couple and they were the only people (other than you) present you should code 'no' here – not 'yes – respondent's spouse partner'. But if only one of the couple was being interviewed but their partner was in the room as

	well, you should code 'yes – respondent's spouse/partner' here.
ScIntA	During concurrent interviews you will be prompted just before the section on cognitive function to ask one of the respondents to leave the room and do their self-completion while you complete CF/EX/PS/FQ in private. It is important to stress to the person who leaves the room that they should not come back in until asked to do so, so they don't interrupt the private questions. Note that in all interviews, if there is someone else in the room who is not being interviewed, you should ask them to leave the room at this point as well. The first person allocated to the session will always be asked to do their private CAPI session first.
laHoCk	If you have skipped either the section on Income and Assets or the section on Housing, or both, you will be prompted at the end of the interview to either go back to complete them or arrange a time to come back to do them. In order to easily get back to the beginning of those sections, choose the appropriate code in CAPI, you will then get a check – instead of suppressing it, simply press ENTER, this will take you back automatically to the beginning of the section. If you are completing these modules on a later date, the easiest way to get to the beginning of them is to go to this question (by pressing END) and then choosing which one you want to complete and pressing ENTER at the check.

## Is the study confidential?

We always take great care to protect the confidentiality of the information you give us. The study results will never be in a form that can reveal your identity. Your name and address will only be known to the researchers at the National Centre for Social Research (NatCen) and will not be stored with the information you provide.

We also obtain information about the health and economic circumstances of some of our respondents from the National Health Service Central Register, the Cancer Registry, the Hospital Episodes Statistics register, the Department for Work and Pensions and Her Majesty's Revenues and Customs (which now incorporates the Inland Revenue). You may already have given us permission to obtain this information, but if not, we may ask for your consent to do so during the course of the interview. If you agree, we would link these details to what you have already told us in the survey. Like everything else you have told us, the information will be completely confidential and will be used for research purposes only. Names and addresses are never included in the results and no individual can be identified from the research. You do not have to give your consent for us to

obtain this data and you can change your mind at any time by writing to the address below.

### Who can I contact about the study?

If you have any more questions, or would like to inform us of a change in your circumstances such as a new address, please contact us on the freephone number 0800 652 4569.

Alternatively, you can write to:

Sue Hobbs  
National Centre for Social Research  
Kings House  
101-135 Kings Road  
Brentwood  
Essex CM14 4LX

You can find out more about the study, or contact us, via the ELSA web site:

<http://www.natcen.ac.uk/elsa/>

**ELSA** English  
Longitudinal  
Study of  
Ageing

# Health and lifestyles of people aged 50 and over

This leaflet gives you more information about the content of the study, and answers questions you may have. If you have any queries or need to contact us, please call freephone 0800 652 4569

## What is the study about?

The English Longitudinal Study of Ageing (ELSA) explores the health, lifestyles and financial situation of people as they grow older. 12,000 people aged 50 and over, and their partners, have now taken part in the study.

You may have helped us previously with the study, for which we are most grateful, and we hope that you can help us again. Alternatively, this may be the first time we have approached you to take part. By talking to as many people as possible, we can ensure that we get a full range of experiences. Participation is voluntary, though we do hope you will take part and contribute to our understanding of the experience of growing older.

## Why are you important?

You are invaluable to our study. We are gradually building up a picture of people living in Britain aged 50 and over. Although the study will not be of direct benefit to you, the information you provide will help us to collect good quality data to ensure the government provides health care and pension systems tailored to people's needs.

## What does the study involve?

An interviewer from NatCen will come and visit you in your home to conduct the interview.

When the interviewer visits they will ask you questions about things we believe to be important in the lives of people aged 50 and over. If you are already a member of the study, you will be familiar with the content of the interview. Topics covered include health, housing, work, retirement, pensions and the quality of life.

We have also added some new questions including some on your dental health, diet and physical activity. You may be asked to think back over time and tell us more about where you

have lived, your family history and your work in the past.

The last time we visited members of this study there was also a nurse interview. There will be no nurse visit this time.

The interview is both varied and interesting, and we hope you will enjoy the experience. It can be arranged according to your needs and availability. Agreeing to participate now does not commit you to continuing. You can change your mind at any time and let us know that you no longer wish to take part.

Your interviewer will be happy to address any questions you may have.

## Who is paying for the study?

Half of the funding has come from a number of UK government departments. The other half has been provided by the National Institute on Aging from the United States who also fund a parallel study in the USA.

## Who is carrying out the study?

The study is being carried out by some of Britain's leading research organisations in health, economics and social research:

- National Centre for Social Research (NatCen)
- International Centre for Health and Society, University College London
- Institute for Fiscal Studies
- Cambridge University

## Study findings make a difference



Welcome to this second ELSA Update. We bring you news and a preview of the fascinating findings emerging from the English Longitudinal Study of Ageing, which follows the health and lifestyles of people aged 50-plus and their partners.

The ELSA wave that ended in August 2005 was a great success, thanks to your help. More than three-quarters of the 12,100 people in the study were interviewed and many also had a visit from an ELSA nurse. Even if you were unable to take part this time, we look forward to seeing you again in the future.

### **Public launch for Wave Two Report**

We are exploring the data you have provided to find out about the ageing process and what it means for public policy. Many of you tell us you enjoy taking part and that you feel it is

important to do something positive to help improve prospects for future generations. We are now looking at what the study tells us about many areas including social exclusion, wealth, long-term illness, eyesight and mobility.

Some early conclusions have already spurred the government to action. Inside this Update you can read more about patterns of social exclusion identified by research that influenced a government action plan to end inequalities for older people. And the Pensions Commission has called ELSA “vital” for understanding retirement trends.

In July we published a report looking at the findings from wave two and we invited academics, government officials and the media to a public launch. You may have seen some of the findings reported in the press.

## Health and lifestyles of people aged 50 and over

Some time ago you took part in the first stage of a study about ageing. It was conducted by the *National Centre for Social Research* jointly with academic researchers from University College London and the Institute for Fiscal Studies, and was funded by a number of Government Departments in Britain and the National Institute on Aging in the United States. Your contribution has helped to make the study a great success, and we are writing to you now to ask for your help in the next stage.

We are hoping to revisit everyone who participated during 2004-2005, to conduct a second interview to see how their lives have changed over the last two years. Everyone who is interviewed will receive a token of appreciation for their help.

We are currently updating our records and wish to establish whether your contact details are correct. Therefore if this letter has been forwarded to you at an address that is different from that above, please complete the enclosed *yellow* form and return it to us in the envelope provided by 17<sup>th</sup> March. By giving us your address you are not committing yourself to be interviewed. We will be in touch again some time in the near future and you can decide then whether you would like to take part.

If the addressee has moved into a residential care home such as a nursing home, or passed away, we would appreciate it if you could spare the time to complete the enclosed *blue* form and return it to us in the envelope provided by 22<sup>nd</sup> March 2006. You will not need a stamp if returning a yellow or blue form.

Any information you provide us will be treated in strict confidence in accordance with the Data Protection Act. If you have any questions about the survey, please do not hesitate to contact Sue Hobbs on freephone 0800 652 4569.

Yours sincerely,



Sue Hobbs  
Project manager

Dear Sir or Madam,

## Health and lifestyles of people aged 50 and over

Some time ago, you kindly helped us with the second stage of a new study about ageing. It was conducted by the *National Centre for Social Research* jointly with academic researchers from University College London and the Institute for Fiscal Studies, and was funded by a number of government departments in Britain and the National Institute on Aging in the United States. Your contribution has helped to make the study a great success, and we are writing to you now to ask for your help in the next stage.

As you may recall, this ground-breaking study, the English Longitudinal Study of Ageing (ELSA), explores the health, lifestyles and financial situation of people as they grow older. We are hoping to revisit everyone who participated in 2004 or 2005 to conduct a third interview to see how their lives have changed or stayed the same. Taking part is entirely voluntary, though we very much hope to interview everybody who took part last time so that our results give an accurate picture of people's experiences.

As a token of our appreciation, the interviewer will give you a cheque for £10. If you are unable to bank the cheque, we can arrange for you to be sent a gift voucher instead.

Your interviewer, \_\_\_\_\_, will contact you in the next few days to invite you to take part and, if you are willing, arrange a time to do the interview. The interview can be arranged according to your needs and availability. The interviewer will be carrying an identification card, with a photograph and the logo of the National Centre for Social Research. They should be able to answer any questions you may have about the study.

**All your answers will be treated in strict confidence.** We hope that you will want to be involved in this important study, and enjoy speaking to one of our interviewers again. If you have any questions or would like to make other arrangements for the interview, please don't hesitate to phone Sue Hobbs on freephone 0800 652 4569.

Yours sincerely,



Professor Sir Michael Marmot  
Principal investigator



Sue Hobbs  
Project manager

REF

P2496

Dear Sir or Madam,

## Health and lifestyles of people aged 50 and over

We are writing to you to ask for your help in the next stage of a study about ageing. The English Longitudinal Study of Ageing (ELSA) explores the health, lifestyles and financial situation of people aged fifty and over, and their partners. The first stage of the study began in 2002, and the second stage was in 2004. The study is being carried out by the *National Centre for Social Research* jointly with academic researchers from University College London and the Institute for Fiscal Studies. Funding comes from a number of government departments in Britain and the National Institute on Aging in the United States.

You have been specially chosen from among the households that took part in the Health Survey for England. Taking part is voluntary, but we hope that all of the people who are chosen will take part so that our results give an accurate picture of people's experiences.

We contacted you two years ago to arrange an interview but unfortunately it was not a convenient time for you. We are very interested in what you have to say and hope that you will be able to help us now. We can arrange for an interviewer to call round any day of the week at any reasonable time and the interview can be arranged according to your needs and availability. The interviewer will be carrying an identification card, with a photograph and the logo of the National Centre for Social Research. They should be able to answer any questions you may have about the study.

As a token of our appreciation, the interviewer will give you a cheque for £10. If you are unable to bank the cheque, we can arrange for you to be sent a gift voucher instead.

Your interviewer, \_\_\_\_\_, will invite you to take part and, if you are willing, arrange a time to do the interview. The interviewer can talk to you about how the interview can be arranged to suit your needs and availability.

**All your answers will be treated in strict confidence.** We hope that you will want to be involved in this important study, and enjoy speaking to one of our interviewers. If you have any questions or would like to make other arrangements for the interview, please don't hesitate to phone Sue Hobbs on freephone 0800 652 4569.

Yours sincerely,



Professor Sir Michael Marmot  
Principal Investigator



Sue Hobbs  
Project Manager



NEW

P2496

Dear Sir or Madam,

## Health and lifestyles of people aged 50 and over

Some time ago, your household kindly took part in the Health Survey for England, which was conducted by the *National Centre for Social Research* on behalf of the Department of Health. Your contribution helped make this study a great success, and we are writing now to ask for your help with another ongoing study called the English Longitudinal Study of Ageing (ELSA), which we believe will be very important in the future. We have enclosed a study leaflet for your information.

The English Longitudinal Study of Ageing (ELSA) explores the health, lifestyles and financial situation of people aged fifty and over, and their partners. The first stage of the study began in 2002, and the second stage was in 2004. The study is being carried out by the *National Centre for Social Research* jointly with academic researchers from University College London and the Institute for Fiscal Studies. Funding comes from a number of government departments in Britain and the National Institute on Aging in the United States.

You have been specially chosen from among the households that took part in the Health Survey for England and we are very interested in what you have to say. Taking part is voluntary, but we hope that all of the people who are chosen will take part so that our results give an accurate picture of people's experiences.

As a token of our appreciation, the interviewer will give you a cheque for £10. If you are unable to bank the cheque, we can arrange for you to be sent a gift voucher instead.

Your interviewer, \_\_\_\_\_, will visit you in the next few days to invite you to take part and, if you are willing, arrange a time to do the interview. The interview can be arranged according to your needs and availability. The interviewer will be carrying an identification card, with a photograph, and should be able to answer any questions you may have about the study.

**All your answers will be treated in strict confidence.** We hope that you will want to be involved in this important study, and enjoy speaking to one of our interviewers again. If you have any questions or would like to make other arrangements for the interview, please don't hesitate to phone Sue Hobbs on freephone 0800 652 4569.

Yours sincerely,



Professor Sir Michael Marmot  
Principal Investigator



Sue Hobbs  
Project Manager

Serial number								Ckl	PerNo	

**P2496**

## Health and lifestyles of people aged 50 and over

We have asked about your health and economic circumstances. To make this information complete we would like to find out

- more about your health and treatment from NHS health records and,
- more about your National Insurance Contributions, benefits, tax records, savings and pensions from data held by Her Majesty’s Revenue and Customs (which now incorporates the Inland Revenue) and the Department for Work and Pensions (formerly the DSS).

We need your written permission for any information to be released. Like everything else you have told us, the information will be completely confidential and will be used for research purposes only. Names and addresses are never included in the results and no individual can be identified from the research. You do not have to give your consent for us to collect this data if you don’t want to. Please ask the interviewer about anything that concerns you or you can call the research team on 0800 652 4569.

I have read or heard this information and have had the opportunity to ask questions. I understand that all the information about me will be treated in strict confidence and used solely for the purpose of research.

### HEALTH DATA

A. I authorise the Department of Health to disclose to the National Centre for Social Research a link to information about my health and treatment held on the Hospital Episodes database. The information we obtain will be limited to the purposes of this study and will cover dates of admission to and discharge from hospital, diagnoses received and treatments given. The link to this information can only be used by researchers who have gained ethical approval for analysing this database. This consent will remain valid until revoked by me in writing.

### NATIONAL INSURANCE CONTRIBUTIONS, BENEFITS AND TAX RECORDS

B. I authorise the Department for Work and Pensions and Her Majesty’s Revenue and Customs to disclose to the National Centre for Social Research information about my National Insurance Contributions, benefits, tax records, savings and pensions. This consent will remain valid until revoked by me in writing.

**Please cross out A or B above if you do not wish to give permission for them both.**

**If you give permission for us to collect any of this information please sign below.**

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_

*If you agreed to part B it will help us if you provide us with your National Insurance number in the space provided, but you do not have to do so.*

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Serial number								CKL	PerNo	
<input type="text"/>										

P2496

## Health and lifestyles of people aged 50 and over

- The NHS Central Register lists all the people in the country and their National Health Service (NHS) number.
- We would like to ask for your consent for us to send your name, address and date of birth to the National Health Service Central Register. A marker will be put against your name to show that you took part in the English Longitudinal Study of Ageing.
- If a person who took part in the English Longitudinal Study of Ageing gets cancer, or dies, the type of cancer or cause of death will be linked with their answers to the survey. By linking this information the research is more useful as we can look at how people's lifestyle can have an impact on their future health.
- This information will be confidential and used for research purposes only.
- By signing this form you are only giving permission for the linking of this information to routine administrative data and nothing else. We will not be able to obtain any other details from your medical records.
- You can cancel this permission at any time in the future by writing to:
- Sue Hobbs, National Centre for Social Research, Kings House, 101-135 Kings Road, Brentwood, Essex CM14 4LX

I, (name) \_\_\_\_\_ consent to the National Centre for Social Research /UCL Joint Health Surveys Unit passing my name, address and date of birth to the National Health Service Central Register. I understand that information held by the NHS Central Register may be used to keep in touch with me and follow up my health status. I understand that these details will be used for research purposes only.

Signature _____	Date _____
Print Name _____	

**P2496**

Serial number

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First name:

## Health and lifestyles of people aged 50 and over

### COGNITIVE MODULE - INTERVIEWER RECORDING BOOKLET

#### Word List – First Recall

**Please write down the words the respondent recalls in the space provided:**

- Do NOT interrupt the respondent
- If respondent is saying words more quickly than you can write them down in full, just write down the first letter of the word
- Do NOT count any words the respondent says which are not on the list

Word List A	Word List A - responses
Hotel	
River	
Tree	
Skin	
Gold	
Market	
Paper	
Child	
King	
Book	

Word List B	Word List B – responses
Sky	
Ocean	
Flag	
Dollar	
Wife	
Machine	
Home	
Earth	
College	
Butter	

Word List C	Word List C – responses
Woman	
Rock	
Blood	
Corner	
Shoes	
Letter	
Girl	
House	
Valley	
Engine	

Word List D	Word List D – responses
Water	
Church	
Doctor	
Palace	
Fire	
Garden	
Sea	
Village	
Baby	
Table	

## Animal Names

**Please write down all the animal names given by the respondent in the space provided:**

- Do NOT interrupt the respondent
- If respondent is saying names more quickly than you can write them down in full, use abbreviations or a tally
- ONLY if the respondent asks for clarification, explain that animals include birds, insects, fish etc.
- If the respondent gets stuck, say "Can you think of any more?"

--	--

**Points to remember:**

- Do NOT count repetitions
- Do NOT count redundancies (e.g. white cow, brown cow)
- Do NOT count named animals (e.g. Spot, Bambi)
- DO count different breeds (e.g. terrier, greyhound)
- DO count gender- or generation-specific names (e.g. bull, cow, heifer, calf)
- If the respondent names animals that are unfamiliar to you, give them the benefit of the doubt and count them (e.g. Kudu)

# Letter Cancellation

EXAMPLE: G T G E ~~W~~ N R E F ~~P~~ A Q B N D

→ A Y O V K S V S Y K W E Z J Z G V A U X C S H S P N K A A K  
I Y N O L C S C L I U A O P F E G M Z T Y M F Y D U P U U O  
O I T V L B U F V L N T H W T T N V D C H H X W A F A A M R  
M I S V X V G H H F P Z G P X T D Q X R U Q E K I E M V C W  
Q Z E I H B W M H A D B Y A S J Z L I H F Y K P Z X W J M C  
R S U W Y E P U Y W U V H Q G N J E J A V K E J M S Y H G Y  
S Y T I H E N V M U G M Q G J J C R Y N K T U D L H M F T V  
N H L P L I X K P G G J X D Q H V E A T V H L I W G V T H B  
L H V M J D T L M W P D W O A N E S T D G X Z D H C A N U W  
A Q F H B B P N O K M E R U F R L F H T M J C N P T Y O I S  
C D N E K E V J X V D Q W S U B M L C Y S N Z I Y Y N O R S  
T R L I E T O L B T N O T R G M D M B J O Z H R Y J X U Y I  
K L T F F T R S Y G N M D M P E I G O V D A B E S N Y P O S  
L C I V X L F V O W C Z P P S W J F B J H P C E G N W K C O  
J M R Y J F L X U H M E Z W K S P L S W J B K I K Q V B R P  
Q S S W G W K V M C K Y C S M E D I G B G B C R D P K E J V  
B K Q R Z Q X W I Z E O K O A M L G Z Z A L R X E L O X O P  
O W Z A H X Q P H B B Z R V H Y X O W H A F K L Q L O R X T  
G Q C F C V T Z B N Z K N A D L K W M X O Q L N S T U Q C Q  
I T W D P W O B E K Q F S Z P L S X O C I Q N O K L K F T O  
S Q X J W U T X F Z S S U K D T F O P U Y L E S P I B N W P  
N S W S U T I P M X O D R C V D L N O F R V W W I N I C U O  
D H T G I Z C M M H X X N K H W Q I T Z X X I O N C S V Y N  
S O V B A B G D B I M T J G T E T L G N H C N Z D C C X U J  
E K J O V C Q Y G D R P L M D R W L W D S H K R D L A R T T  
X X Q U S U I Y C Q C B U O O B T Z P G Q G H C N L I I W Q

## Word List – Second Recall

**Please write the words the respondent recalls in the space provided:**

- Do NOT interrupt the respondent
- If respondent is saying words more quickly than you can write them down in full, just write down the first letter of the word
- Do NOT count any words the respondent says which are not on the list.

Word List A	Word List A - responses
Hotel	
River	
Tree	
Skin	
Gold	
Market	
Paper	
Child	
King	
Book	

Word List B	Word List B – responses
Sky	
Ocean	
Flag	
Dollar	
Wife	
Machine	
Home	
Earth	
College	
Butter	

Word List C	Word List C – responses
Woman	
Rock	
Blood	
Corner	
Shoes	
Letter	
Girl	
House	
Valley	
Engine	

Word List D	Word List D – responses
Water	
Church	
Doctor	
Palace	
Fire	
Garden	
Sea	
Village	
Baby	
Table	

Office use only – scoring letter cancellation

Row and column reached

Correct

Missed

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**P2496**

Serial number

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Ck

--

**HEALTH AND LIFESTYLES OF  
PEOPLE AGED 50 AND OVER  
TIMED WALK**

First person: No 

--	--

 Name 

--	--	--	--	--	--	--	--

Time for first walk: 

--	--

 • 

--	--

Time for second walk: 

--	--

 • 

--	--

Second person: No 

--	--

 Name 

--	--	--	--	--	--	--	--

Time for first walk: 

--	--

 • 

--	--

Time for second walk: 

--	--

 • 

--	--

- Assess safety
- Level floor
- No obstacles
- Walking aids acceptable
- Low-heeled shoes or trainers
- Start timer when first foot touches floor **beyond** line
- Stop when first foot touches floor **beyond** line

**P2496**

Serial number

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Ck

--

**HEALTH AND LIFESTYLES OF  
PEOPLE AGED 50 AND OVER  
TIMED WALK**

First person: No 

--	--

 Name 

--	--	--	--	--	--	--	--

Time for first walk: 

--	--

 • 

--	--

Time for second walk: 

--	--

 • 

--	--

Second person: No 

--	--

 Name 

--	--	--	--	--	--	--	--

Time for first walk: 

--	--

 • 

--	--

Time for second walk: 

--	--

 • 

--	--

- Assess safety
- Level floor
- No obstacles
- Walking aids acceptable
- Low-heeled shoes or trainers
- Start timer when first foot touches floor **beyond** line
- Stop when first foot touches floor **beyond** line

**Explain and demonstrate:**

This is our walking course.

I am going to time you as you walk the course.

I will ask you to walk the course twice.

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

**Demonstrate.**

*(If room available: I will walk with you.)*

Do you feel this would be safe?

**Preparation before walk:**

I'd like you to stand here with your feet lined up at the starting point. Remember to walk at your usual speed, just as if you were walking down the street to go to the shops, and go all the way past the other end of the tape before you stop. Please start walking when I say 'begin'. **Ready, begin.**

**Now I want you to repeat the walk:**

(Repeat explanation)

**Explain and demonstrate:**

This is our walking course.

I am going to time you as you walk the course.

I will ask you to walk the course twice.

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

**Demonstrate.**

*(If room available: I will walk with you.)*

Do you feel this would be safe?

**Preparation before walk:**

I'd like you to stand here with your feet lined up at the starting point. Remember to walk at your usual speed, just as if you were walking down the street to go to the shops, and go all the way past the other end of the tape before you stop. Please start walking when I say 'begin'. **Ready, begin.**

**Now I want you to repeat the walk:**

(Repeat explanation)

P2496

# English Longitudinal Study of Ageing (ELSA)

## CODE BOOK AND EDIT INSTRUCTIONS

# Introduction

## Coding

The ELSA questionnaire contains the following types of questions:

1. Fully closed questions – the existing answer codes take care of responses, and no “other” option is given (e.g. answer categories Yes or No). No backcoding is required for these questions.
2. Open question – No answer codes available for interviewers to use, so the response is recorded verbatim. For questions .....the researcher has developed a code frame. Editors should simply choose the most appropriate code form the code frame.
3. Other-specify – the most common type of question which warrants backcoding. Interviewers have a list of answer codes with the option for “other answer”. The first example of this is **DtypOth**. In many instances it will be possible to code these responses back into the existing code frame, which is indicated in this code book within a text box (always listed first) **This type of ‘back-coding’ should always be the coder’s first response.**

However, back coding may not always be possible if existing answers codes do not cover a particular response. The researchers have looked at some early returns from the field and applied new codes to particular questions for use during editing. New codes are listed after the boxed back-codes, and should be used when existing question codes are not appropriate. Any other difficult cases should be referred to the researchers with a note on the fact sheet.

Please note to use Ctrl K (Blaise don’t know) in cases where the open or other specify answer is don’t know.

## Editing

Most of the editing for this program is carried out by the interviewers in the field. However, there are a couple of additional checks which relate to inconsistencies in the data. It is important that you only make changes to the data according to the rules written in the editing instructions that are provided in the back of this booklet. Where a situation has not been covered you should always consult your supervisor.

Editing is to be done in Blaise in CAPI mode for editing. Errors in the data are triggered for the editor to action as they move through the questionnaire. Editors will have a fact sheet for each respondent.

*Interviewer notes / remarks*

All remarks are listed at the end of the fact sheet. Using these notes it may be possible to establish what the correct response to a particular question should have been and subsequently to recode it.

However, you should document any changes you make on the fact sheet, noting the question name, original response, and recoded response. Please then make sure this fact sheet is sent to the researchers.

If you find that recoding has affected subsequent routing, you must select 'Undo all edits' from the File menu prior to exiting the case. Please then flag this discrepancy to the researchers.

A. Coding Instructions

**CODE FRAME NUMBER 1**

*Variable:* **DiKLO**

*Type:* Other-specify

*Question text:* Who did you live with for most of your childhood?

*Routing:* Respondents who answered 'other' to DiKLiv

**Back-code to DiKLiv when possible (codes 01 to 09)**

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

51 Other - Both grandparents

*(include cases where one is a step grandparent and one is a natural grandparent. Do not include cases where both are step grandparents – code these cases to 55)*

52 Other - Grandmother

*(do not include step grandmother here – code as 55)*

53 Other - Grandfather

*(do not include step grandmother here – code as 55)*

54 Other - Siblings

55 Other - Other relatives or combination

OTHER

85 Other answer – not codeable 01 to 09 or 51 to 55

86 Irrelevant response - not codeable 01 to 09 or 51 to 55

## CODE FRAME NUMBER 2

*Variable:* **HEDiX**

*Type:* Other-specify

*Question text:* Has a doctor ever told that you have any of the [heart] conditions on this card?  
Interviewer: enter name of other heart condition

*Routing:* Respondents who answered “other heart trouble” at HeDiaa

### MULTICODE – CODE ALL THAT APPLY

01 CVD1	High blood pressure or hypertension
02 CVD2	Angina
03 CVD3	A heart attack (including myocardial infarction or coronary thrombosis)
04 CVD4	Congestive heart failure
05 CVD5	A heart murmur
06 CVD6	An abnormal heart rhythm
07 CVD7	Diabetes or high blood sugar
08 CVD8	A stroke (cerebral vascular disease)
09 CVD9	High cholesterol

### OTHER

85 Other answer – not codeable 01 to 08

86 Irrelevant response - not codeable 01 to 08

*Backcode only those other answers that should blatantly have been coded 01-09 (eg if other answer is ‘high blood pressure’ or ‘high bp’ backcode into 01). The factsheets of all other questionnaires which have an answer recorded in HeDix should be kept aside for the Survey Doctor at UCL (Dr James Nazroo). He will be able to tell you how to deal with all ‘other’ heart conditions - whether*

*they should be excluded or kept in under 'other'.*

### CODE FRAME NUMBER 3

*Variable:* **HEDixb**

*Type:* Other-specify

*Question text:* I would like to check whether any of the medications ^youname[pnum] ^areisl[pnum] taking are on this list of ACE inhibitors or A2 receptor blockers. Could you show me the medications, or the repeat prescription list for any medications, that ^heshe[pnum] have been taking over the past week? INTERVIEWER: Please check the names of all medications to see if they are included in the list of ACE inhibitors or A2 receptor blockers. Press 1 if you identify one of the respondent's medications as being on the list of ACE inhibitors or A2 receptor blockers, otherwise press 2.

*Routing:*

01 Ace Taking ACE inhibitor or A2 receptor blocker 02 NotAce Not taking ACE inhibitor or A2 receptor blocker
---

OTHER

03 OthAce Taking other ACE inhibitor not on the showcard

## CODE FRAME NUMBER 4

*Variable:* HEAnj

*Type:* Other-specify

*Question text:* Will you show me where you get this pain or discomfort?

*Routing:* Respondents who answered 'Somewhere else' to HeAni

**Back-code to HeDiaa when possible (codes 01 to 06)**

01 Sternum (upper or middle)

02 Sternum lower

03 Left anterior chest

04 Left arm

05 Right anterior chest

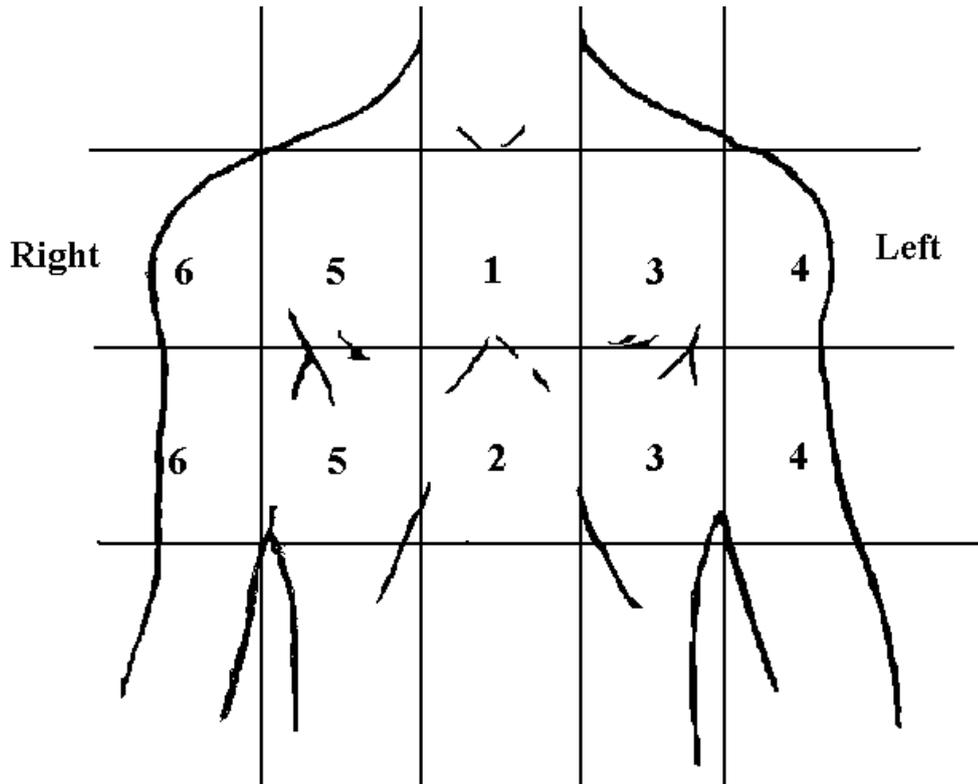
06 Right arm

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

### CARD N



## CODE FRAME NUMBER 5

*Variable:* **Hestopa**

*Type:* Other-specify

*Question text:* What was the main reason that you stopped smoking cigarettes?

*Routing:* Respondents who answered 'other' to Hestopa

### **Back-code to Hestopa when possible (codes 01 to 09)**

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

### OTHER

- 10 Had health problems
- 11 To support spouse, sibling or friend to quit smoking
- 85 Other answer – not codeable 01 to 09
- 86 Irrelevant response - not codeable 01 to 09

## CODE FRAME NUMBER 6

*Variable:* **HeHPsO**

*Type:* Other - specify

*Question text:* Do you currently use any of the services listed on this card?

*Routing:* Respondents who answered 'Other' to HeHPs

Back-code to **HeHPs** when possible (codes to)

- 01 Occupational therapist or physiotherapist
- 02 Chiropodist
- 03 Exercise classes run by the local authority
- 04 Exercise classes run by a voluntary organisation

### OTHER

- 05 Osteopath
- 06 Chiropractor
- 07 Massage
- 08 Acupuncture
- 09 Other alternative therapies e.g. reflexology, aromatherapy, homeopathy
- 10 Gym/health club
- 11 Swimming/aqua aerobics
- 12 Hydrotherapy
- 13 Private exercise classes including dance, yoga, pilates

85 Other answer – not codeable 01 to

86 Irrelevant response - not codeable 01 to

## CODE FRAME NUMBER 7

Variable: **SPPubX**

Type: Other-specify

Question text: Why don't you use public transport more often?

Routing: Respondents who answered 'other' to SPTraB

**Back-code to SPTraB when possible (codes 01 to 06)**

**MULTICODE – CODE ALL THAT APPLY**

01 Too expensive

02 Unreliable

03 Infrequent

04 My health prevents me

05 Do not need to

*(include responses where respondent says they drive or are driven, and cases where respondent cycles or walks)*

06 No public transport available

07 Not convenient

In W3 there is a new list of answer categories for SptraB

(NoneAva (1) "No public transport available",  
Nogo (2) "Public transport available does not  
take me where I want to go",  
expens (3) "Too expensive",  
unreliab (4) "Unreliable",  
infreq (5) "Infrequent",  
health (6) "My health prevents me",  
notneed (7) "Do not need to",  
crime (8) "Fear of crime",  
dirt (9) "Too dirty",  
NotConv (10) "Not convenient",  
walk (11) "Prefer to walk",  
other (95) "Other (specify)")

52 Other - Dirty

OTHER

85 Other answer – not codeable 01 to 07 or 52

86 Irrelevant response - not codeable 01 to 07 or 52

**CODE FRAME NUMBER 8**

*Variable:* **WpTawo**

*Type:* Other-specify

*Question text:* What was your main reason you were away from work last month?

*Routing:* Respondents who answered 'other reasons' at WpTaw

**Back-code to WpTaw when possible (codes 01 to 07)**

- |                                  |
|----------------------------------|
| 01 Leave/holiday                 |
| 02 Sick/injured                  |
| 03 Attending a training course   |
| 04 Laid off/on short time        |
| 05 On strike                     |
| 06 Maternity/Paternity leave     |
| 07 Other personal/family reasons |

OTHER

85 Other answer – not codeable 01 to 07

86 Irrelevant response - not codeable 01 to 07

## CODE FRAME NUMBER 9

*Variable:* **Wpdesa**

*Type:* Other-specify

*Question text:* What describes your current situation?

*Routing:* Respondents who answered 'other' to Wpdes

**Back-code to Wpdes when possible (codes 01 to 06 or 96)**

01 Retired
02 Employed
03 Self-employed
04 Unemployed
05 Permanently sick or disabled
06 Looking after home or family
96 Semi-retired

### OTHER

85 Other answer – not codeable 01 to 06 or 96

86 Irrelevant response - not codeable 01 to 06 or 96

## CODE FRAME NUMBER 10

*Variable:* **WpLJobx (new for Wave 2)**

*Type:* Other-specify

*Question text:* What was your reasons for leaving your previous job?

*Routing:* Respondents who answered 'other reason' at WpLJob

**Back-code to WpLJob when possible (codes 01 to 10)**

**MULTICODE – CODE ALL THAT APPLY**

- |  |
|--|
| <p>01 Own ill health or disability</p> <p>02 Job was too tiring/stressful</p> <p>03 Ill health or disability of a relative/friend</p> <p>04 Company went out of business/site closed down</p> <p>05 Made redundant/dismissed/had no choice</p> <p>06 Took voluntary redundancy</p> <p>07 To spend more time with partner/family</p> <p>08 Career progression</p> <p>09 Fed up with job and wanted a change</p> <p>10 Moved to a different area</p> |
|--|

11 Found a better job (in terms of salary, employment conditions or location)

12 Contract finished

13 Got promoted

14 Took early retirement/retired

15 To have more time for self

16 Salary not high enough

17 Company merged/ changes in employer's status

OTHER

85 Other answer – not codeable 01 to 10

86 Irrelevant response - not codeable 01 to 10

## CODE FRAME NUMBER 11

*Variable:* **WpChgX (new for Wave 2)**

*Type:* Other-specify

*Question text:* Would anything else have enabled you to stay with that employer?

*Routing:* Respondents who answered 'yes' at WpChgnon

**Back-code to WpChg when possible (codes 01 to 06)**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Less physically demanding
- 02 Less mentally demanding/stressful
- 03 Fewer hours/job sharing
- 04 More flexible hours
- 05 Working from home sometimes
- 06 Special equipment/workplace adaptation

### OTHER

07 A salary increase

08 A new boss/new management

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 12

*Variable:* **WpwhyWkX (new for Wave 2)**

*Type:* Other-specify

*Question text:* What were your reasons for starting working?

*Routing:* Respondents who answered 'other reason' at WpWhyWk

**Back-code to WpWhyWk when possible (codes 01 to 05)**

### **MULTICODE – CODE ALL THAT APPLY**

01 I needed the money
02 My own health improved
03 Health of relative/friend improved
04 For enjoyment/company at work
05 I was able to find a suitable job

06 I was headhunted/felt the need that I was wanted

07 I was bored and wanted a change

08 Finished studies

09 To help out a friend or relative

### OTHER

85 Other answer – not codeable 01 to 05

86 Irrelevant response - not codeable 01 to 05

## CODE FRAME NUMBER 13

*Variable:* **WpWyJbx (new for Wave 2)**

*Type:* Other-specify

*Question text:* What were your reasons for taking this job?

*Routing:* Respondents who answered 'other reason' at WpWhyJb

**Back-code to WpWhyJb when possible (codes 01 to 09)**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 The pay was enough
- 02 The hours suited me
- 03 Could come to and/or leave work at times that suited me
- 04 To progress my career
- 05 The content of the job suited me
- 06 Started own business/become self-employed
- 07 Started work in family business
- 08 Was the first job I could get
- 09 Was the first job I found

- 10 Local/nearer to home
- 11 Was the only job I could get
- 12 Better conditions of employment and better benefits
- 13 Company was taken over/departmental reorganization
- 14 Was bored / wanted a change
- 15 Needed the money/to earn extra income on retirement
- 16 Was offered the job/was headhunted
- 17 Was less physically demanding and stressful
- 18 To help out a friend/relative/institution

### OTHER

- 85 Other answer – not codeable 01 to 10
- 86 Irrelevant response - not codeable 01 to 10

## CODE FRAME NUMBER 14

*Variable:* **WpYStpx (new for Wave 2)**

*Type:* Other-specify

*Question text:* What were your reasons for stopping working?

*Routing:* Respondents who answered 'other reason' at WpYStp

**Back-code to WpYStp when possible (codes 01 to 14)**

### **MULTICODE – CODE ALL THAT APPLY**

- |   |
|---|
| <ul style="list-style-type: none"><li>01 Own ill health or disability</li><li>02 Working was too tiring/stressful</li><li>03 Ill health or disability of a relative/friend</li><li>04 Company went out of business/site closed down</li><li>05 Made redundant/dismissed/had no choice</li><li>06 Took voluntary redundancy</li><li>07 Could not find another job</li><li>08 Could afford to stop working</li><li>09 To spend more time with partner/family</li><li>10 To enjoy life while still fit and young enough</li><li>11 Fed up with working and wanted a change</li><li>12 To stop working at the same time as husband/wife/partner</li><li>13 To give young generation a chance</li><li>14 Moved to a different area</li></ul> |
|---|

15 Contract ran out

16 Reached retirement age

17 Wanted to study

### OTHER

85 Other answer – not codeable 01 to 14

86 Irrelevant response - not codeable 01 to 14

## CODE FRAME NUMBER 15

*Variable:* **WpNChgX (new for Wave 2)**

*Type:* Other-specify

*Question text:* Would anything else have enabled you to stay with this employer?

*Routing:* Respondents who answered 'yes' at WpNChg

**Back-code to WpNChg when possible (codes 01 to 06)**

### **MULTICODE – CODE ALL THAT APPLY**

01 Less physically demanding
02 Less mentally demanding/stressful
03 Fewer hours/job sharing
04 More flexible hours
05 Working from home sometimes
06 Special equipment/workplace adaptation

07 Change in working conditions or job responsibilities

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 16

*Variable:* **WpNChgBX (new for Wave 2)**

*Type:* Other-specify

*Question text:* In what ways did employer change job?

*Routing:* Respondents who answered 'other' at WpNChgB

**Back-code to WpNChgB when possible (codes 01 to 06)**

### **MULTICODE – CODE ALL THAT APPLY**

- |   |
|---|
| 01 Less physically demanding              |
| 02 Less mentally demanding/stressful      |
| 03 Fewer hours/job sharing                |
| 04 More flexible hours                    |
| 05 Working from home sometimes            |
| 06 Special equipment/workplace adaptation |

07 Change in working conditions or job responsibilities

### OTHER

- 85 Other answer – not codeable 01 to 06  
86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 17

*Variable:* **WpChgDx (new for Wave 2)**

*Type:* Other-specify

*Question text:* Would anything else have enabled you to stay with this employer with your health problem or disability?

*Routing:* Respondents who answered 'yes' at WpChgDn

**Back-code to WpChgD when possible (codes 01 to 06)**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Less physically demanding
- 02 Less mentally demanding/stressful
- 03 Fewer hours/job sharing
- 04 More flexible hours
- 05 Working from home sometimes
- 06 Special equipment/workplace adaptation

07 Change in working conditions or job responsibilities

### OTHER

- 85 Other answer – not codeable 01 to 06
- 86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 18

*Variable:* **WpChgLx (new for Wave 2)**

*Type:* Other-specify

*Question text:* Would you like the work that you do for your employer to change as a result of your health problem or disability?

*Routing:* Respondents who answered 'other change' at WpChgL

**Back-code to WpChgL when possible (codes 01 to 06)**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Less physically demanding
- 02 Less mentally demanding/stressful
- 03 Fewer hours/job sharing
- 04 More flexible hours
- 05 Working from home sometimes
- 06 Special equipment/workplace adaptation

### OTHER

- 85 Other answer – not codeable 01 to 06
- 86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 19

*Variable:* **WpWyNJX (new for Wave 2)**

*Type:* Other-specify

*Question text:* Reasons for trying to leave current job

*Routing:* Respondents who answered 'other reason' at WpWhyNJ

**Back-code to WpWhyNJ when possible (codes 01 to 12)**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Own ill health or disability
- 02 Job was too tiring/stressful
- 03 Ill health or disability of a relative/friend
- 04 Company went out of business/site closed down
- 05 Made redundant/dismissed/had no choice
- 06 Taking voluntary redundancy
- 07 To spend more time with partner/family
- 08 Fed up with job and wanted a change
- 09 Fed up with employer/colleagues and want a change
- 10 To progress my career
- 11 To earn more money
- 12 Moving to a different area
- 13 Other (95) "Other reason")

- 14 Contract is running out/job was temporary
- 15 Company reorganization/change in management
- 16 Not challenging or demanding enough
- 17 Looking for longer hours
- 18 Wants a job local/nearer to home
- 19 Planning to go abroad

### OTHER

- 85 Other answer – not codeable 01 to 12
- 86 Irrelevant response - not codeable 01 to 12

## CODE FRAME NUMBER 20

*Variable:* **WpLkChX (new for Wave 2)**

*Type:* Other-specify

*Question text:* Whether would like current job to change in any of these ways.

*Routing:* Respondents who answered 'other' at WpLkCh

**Back-code to WpLkCh when possible (codes 01 to 06)**

**MULTICODE – CODE ALL THAT APPLY**

- 01 Less physically demanding
- 02 Less mentally demanding/stressful
- 03 Fewer hours/job sharing
- 04 More flexible hours
- 05 Working from home sometimes
- 06 Special equipment/workplace adaptation

- 07 Local/nearer to home
- 08 Higher salary
- 09 Have a new boss/ change in management
- 10 Better employment conditions and benefits
- 11 More challenging or demanding job
- 12 Longer hours
- 13 No, would like to retire soon

### OTHER

- 85 Other answer – not codeable 01 to 06
- 86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 21

*Variable:* **WpNoLkX (new for Wave 2)**

*Type:* Other-specify

*Question text:* Reasons for staying in current job

*Routing:* Respondents who answered 'other' at WpNoLk

**Back-code to WpNoLk when possible (codes 01 to 06)**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Don't think I could get another job that would suit me better
- 02 Too difficult/time-consuming to look for another job
- 03 Pay in current job
- 04 Will be retiring soon so not worth looking for another job
- 05 Pension scheme in current job
- 06 No other suitable jobs available in local area

- 07 Enjoyment/like it/job satisfaction
- 08 Commitment to own business/family business or loyal to company
- 09 Keep mind active/exercise/get out of house
- 10 Job is not too demanding and stressing
- 11 Convenient location/nearer to home
- 12 Financial security/good money (perhaps this can be the same as 03)
- 13 Good employment conditions or benefits
- 14 Suitable hours
- 15 Being one's own boss/working for a relative or friend/ has a senior position
- 16 Friends work there/gets on well with others
- 17 Not staying/made redundant/retired

### OTHER

- 85 Other answer – not codeable 01 to 09
- 86 Irrelevant response - not codeable 01 to 09

## CODE FRAME NUMBER 22

*Variable:* **WpYLft (new for Wave 2)**

*Type:* Other-specify

*Question text:* Why are you no longer a member of this pension scheme?

*Routing:* Respondents who answered 'other' at WpLftPS

**Back-code to WpYLft when possible (codes 01 to 03)**

**MULTICODE – CODE ALL THAT APPLY**

01 Changed employer
02 Employer no longer offers pension scheme
03 No longer eligible to be a member of pension scheme
04 Left as could not afford payments
05 Started receiving pension

06 Changes in pension scheme

### OTHER

85 Other answer – not codeable 01 to 03

86 Irrelevant response - not codeable 01 to 03

## CODE FRAME NUMBER 23

*Variable:* **WpPSMo**

*Type:* Other-specify

*Question text:* Why aren't you a member of the [pension] scheme?

*Routing:* Respondents who answered 'other reason' to WpPSM

**Back-code to WpPSM when possible (codes 01 to 04)**

### **MULTICODE – CODE ALL THAT APPLY**

01 Preferred, or already had, other arrangement

02 Expected to move job

03 Could not afford payments

04 Not eligible to join

05 Already have another pension

06 Age means it's too late now/too old so not worth it

07 Only work reduced hours/part time so not worth it

08 Did not like/understand scheme offered

### OTHER

85 Other answer – not codeable 01 to 08

86 Irrelevant response - not codeable 01 to 08

## CODE FRAME NUMBER 24

*Variable:* **WpKind**

*Type:* Other-specify

*Question text:* What kind of pension scheme is it?

*Routing:* Respondents who answered 'Other retirement saving scheme' at WpKP

### **Back-code to WpKP when possible (codes 01 to 06)**

- 01 Employer provided (occupational) pension scheme
- 02 Private Personal Pension
- 03 Group Personal Pension
- 04 Stakeholder pension
- 05 S226 plan (self-employed personal pension)
- 06 Retirement Annuity pensions (pre 86 PPPs)

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 25

*Variable:* **WpOdp**

*Type:* Other-specify

*Question text:* How will your pension be calculated?

*Routing:* Respondents who answered 'In some other way' at WpDesP

**Back-code to WpDesP when possible (codes 01 to 03)**

<p>01 Some fraction of my final year's salary</p> <p>02 Some fraction of my salary from all years when I have been in the scheme</p> <p>03 Some fraction of my last five years' salary</p> <p>05 Don't know</p>
---

51 Other - Some fraction of my last three years' salary

### OTHER

85 Other answer – not codeable 01 to 03 or 05 or 51

86 Irrelevant response - not codeable 01 to 03 or 05 or 51

*Most 'other' answers can be coded into 51.*

## CODE FRAME NUMBER 26

*Variable:* **Wpfsal**

*Type:* Other-specify

*Question text:* What fraction will be added to your final pension for each year's service?

*Routing:* Respondents who answered 'other' to WpFsap

**Back-code to WpFsap when possible (codes 01, 02 or 04)**

01 sixtieth "1/60"

02 eightieth "1/80"

04 Don't know

05 half "1/2"

etc...

### OTHER

85 Other answer – not codeable 01 to 04

86 Irrelevant response - not codeable 01 to 04

## CODE FRAME NUMBER 27

*Variable:* **WpRScO**

*Type:* Other-specify

*Question text:* Why did you stop contributing to this Personal Pension?

*Routing:* Respondents who answered 'other' at WpRsc

**Back-code to WpRsc when possible (codes 01 to 05)**

**MULTICODE – CODE ALL THAT APPLY**

01 Moved job and joined employer's pension scheme
02 Rejoined employer's pension scheme in existing job
03 Rejoined State Earnings Related Pension Scheme
04 Worried about risks
05 Worried about publicity concerning personal pensions

06 Because of own illness/disability

07 Stopped working/unemployed

08 Could not afford it

09 Changed jobs and not known whether joined new scheme

### OTHER

85 Other answer – not codeable 01 to 09

86 Irrelevant response - not codeable 01 to 09

## CODE FRAME NUMBER 28

*Variable:* **WpORea**

*Type:* Other-specify

*Question text:* What were your main reasons for taking early retirement?

*Routing:* Respondents who answered 'other' to WpReas

**Back-code to WpReas when possible (codes 01 to 11)**

**MULTICODE – 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

96 None of these

97 Does not consider has retired early

### OTHER

85 Other answer – not codeable 01 to 11 or 96-97

86 Irrelevant response - not codeable 01 to 11 or 96-9

## CODE FRAME NUMBER 29

*Variable:* **WpORRe**

*Type:* Other-specify

*Question text:* What were your reasons for retiring?

*Routing:* Respondents who answered 'other' to WpRRE

**Back-code to WpRRE when possible (codes 01 to 11)**

### **MULTICODE – 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
- 96 None of these

12 Life event – (re)married/moved house/death of spouse

13 Could afford to

### OTHER

85 Other answer – not codeable 01 to 13 or 96

86 Irrelevant response - not codeable 01 to 13 or 96

## CODE FRAME NUMBER 30

*Variable:* **WpHLWho**

*Type:* Open

*Question text:* Who pays for this health insurance?

*Routing:* If respondent answered 'Paid for by someone else' at WpHowU

01 Partner / Husband / Wife

02 Other family member

03 Company / Employer (*including own, partner's, sibling's, children's*)

04 Pension fund

### OTHER

85 Other answer – not codeable 01 to 04

86 Irrelevant response - not codeable 01 to 04

## CODE FRAME NUMBER 31

*Variable:* **laHdRo**

*Type:* Other-specify

*Question text:* Which other health or disability benefits have you received in the last year?

*Routing:* Respondents who answered 'Some other benefit for people with disabilities' at lahdR

**Back-code to lahdR when possible (codes 01 to 08).**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Incapacity Benefit (previously Invalidity Benefit)
- 02 Severe Disablement Allowance (SDA)
- 03 Statutory sick pay (SSP)
- 04 Attendance Allowance
- 05 Disability Living Allowance
- 06 Industrial Injuries Disablement Benefit
- 07 War Disablement Pension or War Widow's Pension
- 08 Carer's Allowance
- 95 Some other benefit for people with disabilities (please say what)
- 96 None of these

### OTHER

85 Other answer – not codeable 01 to 09 or 96

86 Irrelevant response - not codeable 01 to 09 or 96

### *EDITOR:*

*Backcode into lahdR where possible. If cannot, check whether the benefit should have been recorded at laBeR (see code frame 31). If yes, mark this on the factsheet and flag to researchers.*

*If the response is 'Housing' or 'Housing benefit' select code 86, and check on the fact sheet that HoRent=9997 or HoRebt=1.*

*If neither  $HoRent=9997$  nor  $HoRebt=1$  mark this on the factsheet and flag to researchers.*

*If the response is 'Council tax benefit', 'Council Tax paid for', or 'Council tax reduction' select code 86, and check on the fact sheet that  $HOCTB=1$ .  
If  $HOCTB$  is not 1, mark this on the factsheet and flag to researchers.*

*If the response is 'Winter fuel' select code 86, and check on the fact sheet that  $laFuel=1$ .  
If  $laFuel=0$ , mark on the factsheet and flag to researchers.*

## CODE FRAME NUMBER 32

*Variable:* **laHdpo**

*Type:* Other-specify

*Question text:* Which other health or disability benefits has your husband/wife received in the last year?

*Routing:* Respondents who answered 'Some other benefit for people with disabilities' at lahdp

**Back-code to lahdp when possible (codes 01 to 08).**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Incapacity Benefit (previously Invalidity Benefit)
- 02 Severe Disablement Allowance (SDA)
- 03 Statutory sick pay (SSP)
- 04 Attendance Allowance
- 05 Disability Living Allowance
- Include Mobility and/or Motability Allowance/Payment/Component*
- 06 Industrial Injuries Disablement Benefit
- 07 War Disablement Pension or War Widow's Pension
- 08 Carer's allowance (formally Invalid Care Allowance)
- 95 Some other benefit for people with disabilities (please say what)
- 96 None of these

### OTHER

85 Other answer – not codeable 01 to 09 or 96

86 Irrelevant response - not codeable 01 to 09 or 96

*EDITOR:*

*Backcode into lahdp where possible. If cannot, check whether the benefit should have been recorded at laBeP (see code frame 32). If yes, mark this on the factsheet and flag to researchers.*

*If the response is 'Housing' or 'Housing benefit' select code 86, and check on the fact sheet that HoRent=9997 or HoRebt=1.*

*If neither HoRent=9997 nor HoRebt=1 mark this on the factsheet and flag to researchers.*

*If the response is 'Council tax benefit', 'Council Tax paid for', or 'Council tax reduction' select code 86, and check on the fact sheet that HOCTB=1.*

*If HOCTB is not 1, mark this on the factsheet and flag to researchers.*

*If the response is 'Winter fuel' select code 86, and check on the fact sheet that laFuel=1.*

*If laFuel=0, mark on the factsheet and flag to researchers.*

## CODE FRAME NUMBER 33

*Variable:*     **laBeRo**

*Type:*         Other-specify

*Question text:*     What other benefits have you received in the last year?

*Routing:*         Respondents who answered 'other' to laBeR

**Back-code to laBeR when possible (codes 01 to 08).**

### **MULTICODE – CODE ALL THAT APPLY**

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 Working Families Tax Credit)

04 Job Seeker's Allowance

05 Guardian's Allowance

06 Widows pension/Widowed mother's allowance/Widowed parent's allowance/Bereavement allowance

07 Child Benefit

08 Child Tax Credit

95 Some other state benefit (please say what)

96 None of these

51 Other - 50+ employment credit

### OTHER

85 Other answer – not codeable 01 to 06, 96 or 51

86 Irrelevant response - not codeable 01 to 06, 96 or 51

*Backcode into laBeR where possible. If cannot, check whether the benefit should have been recorded at lahdR (see code frame 29). If yes, mark this on the factsheet and flag to researchers.*

*If the response is 'Housing' or 'Housing benefit' select code 86, and check on the fact sheet that HoRent=9997 or HoRebt=1.*

*If neither HoRent=9997 nor HoRebt=1 mark this on the factsheet and flag to researchers.*

*If the response is 'Council tax benefit', 'Council Tax paid for', or 'Council tax reduction' select code 86, and check on the fact sheet that HOCTB=1.*

*If HOCTB is not 1, mark this on the factsheet and flag to researchers.*

*If the response is 'Winter fuel' select code 86, and check on the fact sheet that laFuel=1.*

*If laFuel=0, mark on the factsheet and flag to researchers.*

## CODE FRAME NUMBER 34

*Variable:*     **laBepo**

*Type:*         Other-specify

*Question text:*     Which other benefits has your husband / wife received in the last year?

*Routing:*         Respondents who answered 'other' to laBeP

**Back-code to laBeP when possible (codes 01 to 08).**

**MULTICODE – CODE ALL THAT APPLY**

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 Working Families Tax Credit)

04 Job Seeker's Allowance

05 Guardian's Allowance

06 Widows pension/Widowed mother's allowance/Widowed parent's allowance/Bereavement allowance

07 Child Benefit

08 Child Tax Credit

95 Some other state benefit (please say what)

96 None of these

51 Other - 50+ employment credit

### OTHER

85 Other answer – not codeable 01 to 08, 96 or 51

86 Irrelevant response - not codeable 01 to 08, 96 or 51  
*Include responses about pensions under this code.*

**EDITOR**

*Backcode into laBeP where possible. If cannot, check whether the benefit should have been recorded at lahdP (see code frame 30). If yes, mark this on the factsheet and flag to researchers.*

*If the response is 'Housing' or 'Housing benefit' select code 86, and check on the fact sheet that HoRent=9997 or HoRebt=1.*

*If neither HoRent=9997 nor HoRebt=1 mark this on the factsheet and flag to researchers.*

*If the response is 'Council tax benefit', 'Council Tax paid for', or 'Council tax reduction' select code 86, and check on the fact sheet that HOCTB=1.*

*If HOCTB is not 1, mark this on the factsheet and flag to researchers.*

*If the response is 'Winter fuel' select code 86, and check on the fact sheet that laFuel=1.*

*If laFuel=0, mark on the factsheet and flag to researchers.*

## CODE FRAME NUMBER 35

*Variable:*     **lapayo**

*Type:*         Other-specify

*Question text:*     What was the reason for this payment?

*Routing:*         Respondents who answered 'other' at lapayr

### **Back-code to lapayr when possible (codes 01 to 06)**

- 01 Financial support for children
- 02 Household bills/expenses
- 03 Spending money/allowance
- 04 Loan repayment
- 05 Maintenance or alimony
- 06 Royalties

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 36

*Variable:* **laparo**

*Type:* Other-specify

*Question text:* What was the reason for this payment?

*Routing:* Respondents who answered 'other' at laPR

### **Back-code to laPR when possible (codes 01 to 06)**

01 Financial support for children

02 Household bills/expenses

03 Spending money/allowance

04 Loan repayment

05 Maintenance or alimony

06 Royalties

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 37

*Variable:* **lapko**

*Type:* Other-specify

*Question text:* What was the source of other payment or payments in kind received in the last year?

*Routing:* Respondents who answered 'Other payment' at lapk

**Back-code to lapk when possible (codes 01 to 07)**

### **MULTICODE – CODE ALL THAT APPLY**

- 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
- 96 None of these

### OTHER

85 Other answer – not codeable 01 to 07 or 96

86 Irrelevant response - not codeable 01 to 07 or 96

## CODE FRAME NUMBER 38

*Variable:* **laorgd**

*Type:* Other-specify

*Question text:* People organise their family finances in different ways.  
How do you organise yours?

*Routing:* Respondents who answered 'Some other arrangement' at laorgf

**Back-code to laorgf when possible (codes 01 to 06)**

- 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

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 39

*Variable:*     **labinw**

*Type:*         Other-specify

*Question text:*     In your household who has the final say in big financial decisions?

*Routing:*         Respondents who answered 'other' to lafind

**Back-code to lafind when possible (codes 01 to 03)**

01 Respondent
02 Partner
03 Both have equal say

### OTHER

85 Other answer – not codeable 01 to 03

86 Irrelevant response - not codeable 01 to 03

## **CODE FRAME NUMBER 40**

*Variable:*     **HoOinc**

*Type:*         Other-specify

*Question text:*     What other services does your rent include?

*Routing:*        Respondents who answered 'other' to Holnca

**Back-code to Holnca when possible (codes 01 to 05)**

### **MULTICODE – CODE ALL THAT APPLY**

01 Meals

02 Gardening

03 Cleaning

04 Warden or porter

05 Security service/guard

96 None of these

### **OTHER**

85 Other answer – not codeable 01 to 05 or 96

86 Irrelevant response - not codeable 01 to 05 or 96

## CODE FRAME NUMBER 41

*Variable:* **HoHBO**

*Type:* Other-specify

*Question text:* What other services does your accommodation come with?

*Routing:* Respondents who answered 'other' to HoHB

**Back-code to HoHB when possible (codes 01 to 05)**

### **MULTICODE – CODE ALL THAT APPLY**

01 Meals
02 Garden
03 Cleaning
04 Warden or porter
05 Security service / guard
96 None of these

### OTHER

85 Other answer – not codeable 01 to 05 or 96

86 Irrelevant response - not codeable 01 to 05 or 96

## CODE FRAME NUMBER 42

*Variable:* **HoMto**

*Type:* Other-specify

*Question text:* What type of mortgage or loan is that?

*Routing:* Respondents who answered 'other' to HoMty

**Back-code to HoMty when possible (codes 01 to 05 or 96 or 97)**

- 01 A repayment mortgage or loan (where your mortgage payments cover interest and  
part of the original loan)
- 02 An endowment mortgage (where your mortgage payments cover interest only and  
you save separately to pay off the capital)
- 03 Part repayment and part endowment
- 04 A pension mortgage (where your mortgage payments cover interest only)
- 05 A PEP, ISA or Unit Trust mortgage
- 96 Interest only mortgage
- 97 Equity release

### OTHER

- 85 Other answer – not codeable 01 to 05 or 96-97
- 86 Irrelevant response - not codeable 01 to 05 or 96-97

## CODE FRAME NUMBER 43

*Variable:* **HoMUseO (new for Wave 2)**

*Type:* Other-specify

*Question text:* What was the mortgage extension used for?

*Routing:* Respondents who answered 'other use' to HoMUse

**Back-code to HoMUse when possible (codes 01 to 04)**

**MULTICODE – CODE ALL THAT APPLY**

01 Home extension
02 Home improvements
03 Car purchase
04 Other consumable goods

### OTHER

85 Other answer – not codeable 01 to 04

86 Irrelevant response - not codeable 01 to 04

## CODE FRAME NUMBER 44

*Variable:* **HoMNUO (new for Wave 2)**

*Type:* Other-specify

*Question text:* Apart from paying off an existing mortgage, what did you use the new mortgage(s) for?

*Routing:* Respondents who answered 'other' to HoMNUse

**Back-code to HoMNUse when possible (codes 01 to 04)**

**MULTICODE – CODE ALL THAT APPLY**

01 Home extension
02 Home improvements
03 Car purchase
04 Other consumable goods

### OTHER

85 Other answer – not codeable 01 to 04

86 Irrelevant response - not codeable 01 to 04

## **CODE FRAME NUMBER 45**

*Variable:*     **Holnce**

*Type:*         Other-specify

*Question text:*     What else do your repayments include?

*Routing:*        Respondents who answered 'other' to Holnc

**Back-code to Holnc when possible (codes 01 to 03)**

### **MULTICODE – CODE ALL THAT APPLY**

- 01 Mortgage protection policy
- 02 Buildings insurance
- 03 Contents or possessions insurance
- 96 None of these

### OTHER

85 Other answer – not codeable 01 to 03 or 96

86 Irrelevant response - not codeable 01 to 03 or 96

## CODE FRAME NUMBER 46

*Variable:* **HoOincX**

*Type:* Other-specify

*Question text:* It is possible to raise money based on the value of your home. These arrangements are sometimes known as equity release schemes. Have you ever raised any income or capital from the value of your current home through ... Interviewer – record details

*Routing:* Respondent who answered 'in some other way' at HoRinc

**Back-code to HoRinc when possible (codes 01 to 03)**

<p>01 a home income or mortgage annuity plan</p> <p>02 a home reversion scheme</p> <p>03 a private arrangement (for example with a relative)</p> <p>96 None of these</p>
--

### OTHER

85 Other answer – not codeable 01 to 03 or 96

86 Irrelevant response - not codeable 01 to 03 or 96

## CODE FRAME NUMBER 47

*Variable:* **HORMovO (new at Wave 2)**

*Type:* Other-specify

*Question text:* In general terms, what were the reasons you moved home?

*Routing:* Respondent who answered 'other reason' at HoRMov.

**Back-code to HoRMov when possible (codes 01 to 12)**

### **MULTICODE – CODE ALL THAT APPLY**

01 Job relocated	
02 Moved to start a new job	
03 Moved to a better area, or one with fewer problems	
04 Moved to a more suitable location	HoOincX
05 Bought own home	
06 Was evicted, couldn't afford to pay mortgage and home repossessed	
07 Moved for health reasons	
08 Moved in with partner	
09 Split from partner	
10 Moved in with family and friends	
11 Moved to be nearer family and/or friends	
12 Other financial reasons such as to release capital or 'couldn't afford to run house'	

13 Home was in very poor condition or was demolished

14 Moved to residential/nursing home

15 Moved abroad/Was planning to move abroad

### OTHER

85 Other answer – not codeable 01 to 12

86 Irrelevant response - not codeable 01 to 12

## CODE FRAME NUMBER 48

*Variable:* **HORMovb (new at Wave 2)**

*Type:* Other-specify

*Question text:* In what way is your new home more suitable?

*Routing:* Respondent who answered 'other reason' at HoRMova.

**Back-code to HoRMova when possible (codes 01 to 04)**

### **MULTICODE – CODE ALL THAT APPLY**

01 Smaller

02 Larger

03 Fewer maintenance problems

04 More suitable given respondent's health problems

05 There are no stairs to climb/home is on ground floor

06 Home is of better quality

07 Home is in a better area/in more convenient location

### OTHER

85 Other answer – not codeable 01 to 04

86 Irrelevant response - not codeable 01 to 04

## CODE FRAME NUMBER 49

*Variable:* HoProbo

*Type:* Other-specify

*Question text:* Does your accommodation have any of these problems?

*Routing:* Respondents who answered 'other' to HoProb

**Back-code to HoProb when possible (codes 01 to 12)**

**MULTICODE – CODE ALL THAT APPLY**

01 Shortage of space

02 Noise from neighbours

03 Other street noise, such as traffic, businesses, factories

*Include aircraft noise here, and noisy children in the street/outside the house*

04 Too dark, not enough light

05 Pollution, grime or other environmental problems caused by traffic or industry

06 Rising damp in floors and walls

07 Water getting in from roof, gutters or windows

08 Bad condensation problem

09 Problems with electrical wiring or plumbing

10 General rot and decay

11 Problems with insects, mice or rats

12 Too cold in winter

96 None of these

51 Other - Vandalism including graffiti

52 Other - Structural problems eg subsidence, cracks in walls

OTHER

85 Other answer – not codeable 01 to 12, 96, 51 or 52

86 Irrelevant response - not codeable 01 to 12, 96, 51 or 52

## CODE FRAME NUMBER 50

*Variable:* HoOheo

*Type:* Other-specify

*Question text:* Do you use any other form of heating?

*Routing:* Respondents who said 'other' at HoOhea

**Back-code to HoOhea when possible (codes 01 to 04)**

### **MULTICODE – CODE ALL THAT APPLY**

01 Gas fire

02 Electric Fire

03 Paraffin Heaters

04 Solid fuel

96 No other heating

### OTHER

85 Other answer – not codeable 01 to 03 or 51

86 Irrelevant response - not codeable 01 to 03 or 51

### *EDITOR:*

- 1. Check for whether respondent has answered 'central heating' or 'radiators' to HoOheo*
- 2. If yes, go back to question HoCenh*
- 3. If HoCenh=2, change to 1*

## CODE FRAME NUMBER 51

*Variable:* HoFuelO

*Type:* Other-specify

*Question text:* What other sources of fuel or power do you use?

*Routing:* Respondents who said 'other' at HoFuel

**Back-code to HoFuel when possible (codes 01 to 06)**

**MULTICODE – CODE ALL THAT APPLY**

01 Mains gas

02 Electricity

03 Coal/Smokeless fuel

04 Paraffin/Bottled gas

05 Oil

06 Wood

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 52

*Variable:* **CfLetEO**

*Type:* Other-specify

*Question text:* Was the respondent able to do the letter cancellation task?

*Routing:* Respondents who answered 'no, for other reason' to CfLetEn

**Back-code to CfLetEn when possible (codes 01 to 02)**

01 Yes

02 No, because has reading problems

### OTHER

03 Blind or poor eyesight

04 Deaf or hard of hearing

05 Too tired

06 Has other illness or physical impairment that affects ability to perform test

07 Impaired concentration

08 Very nervous or anxious

09 Has other mental impairment

10 Problems with the laptop

11 Refusal/didn't want to take part

12 Difficulty using pen

13 Didn't know what to do/didn't understand task

14 Distressed/upset

15 Under influence of alcohol

85 Other answer – not codeable 01 to 15

86 Irrelevant response - not codeable 01 to 15

## CODE FRAME NUMBER 53

*Variable:* **CfPromo**

*Type:* Other - specify

*Question text:* Is the respondent able to do this task?

*Routing:* Respondents who answered 'No, for other reason' to CfProm

Back-code to **CfProm** when possible (**codes 01 to 03**)

01 Yes

02 No, because is blind or has poor eyesight

03 No, because is unable to use pen

### OTHER

04 Deaf or hard of hearing

05 Too tired

06 Has other illness or physical impairment that affects ability to perform test

07 Impaired concentration

08 Very nervous or anxious

09 Has other mental impairment

10 Has difficulty understanding English

85 Other answer – not codeable 01 to 10

86 Irrelevant response - not codeable 01 to 10

## CODE FRAME NUMBER 54

*Variable:* **CfWhatO**

*Type:* Other - specify

*Question text:* What factors may have impaired the respondent's performance?

*Routing:* Respondents who answered 'Other answer (SPECIFY)' to CfWhat

Back-code to **CfWhat** when possible (codes 01 to 11)

- 01 Blind or poor eyesight
- 02 Deaf or hard of hearing
- 03 Too tired
- 04 Has other illness or physical impairment that affects ability to perform test
- 05 Impaired concentration
- 06 Very nervous or anxious
- 07 Has other mental impairment
- 08 Interruption or distraction – e.g. phone call or visitor
- 09 Noisy environment
- 10 Problems with the laptop
- 11 Has difficulty understanding English

### OTHER

- 12 Respondent refused/didn't want to take part
- 13 Distressed/upset e.g. from bereavement
- 14 Memory problems
- 15 Under the influence of alcohol

85 Other answer – not codeable 01 to 11

86 Irrelevant response - not codeable 01 to 11

## CODE FRAME NUMBER 55

*Variable:* ErCAX

*Type:* Other-specify

*Question text:* What relation is this person or people to you?

*Routing:* Respondents who said 'other' at ErCAB

**Back-code to ErCAB when possible (codes 01 to 07)**

01 Spouse or partner

02 Child

03 Grandchild

04 Parent

05 Parent in law

06 Other relative

07 Friend or neighbour

95 Other

### OTHER

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 56

*Variable:* **FqCultO**

*Type:* Other-specify

*Question text:* How would you describe your cultural background?

*Routing:* Respondents who answered 'other cultural background' to FqWCult, FqBcg, FqBack, FqCbac or FqCulb

**Do NOT backcode**

**MULTICODE - CODE ALL THAT APPLY**

01. British
02. Irish
03. English
04. Scottish
05. Welsh
06. Cornish
07. Cypriot (part not stated)
08. Greek
09. Greek Cypriot
10. Turkish
11. Turkish Cypriot
12. Italian
13. Irish Traveller
14. Traveller/Gypsy/Romany
15. Polish
16. All republics which made up the former USSR
17. Kosovan
18. Albanian
19. Bosnian
20. Croation
21. Serbian
22. Other republics which made up the former Yugoslavia
23. Other white European

24. South American
25. Mixed White
26. Other white, white unspecified
27. White and Black Caribbean
28. White and Black African
29. White and Asian
30. Black and Asian
31. Black and Chinese
32. Black and White
33. Chinese and White
34. Asian and Chinese
35. Other Mixed, Mixed unspecified
36. Indian or British Indian
37. Pakistani or British Pakistani
38. Bangladeshi or British Bangladeshi
39. Mixed Asian
40. Punjabi
41. Kashmiri
42. East African Asian
43. Sri Lankan
44. Tamil
45. Sinhalese
46. British Asian
47. Other Asian, Asian unspecified
48. Caribbean
49. African
50. Somali
51. Mixed Black
52. Nigerian
53. Black British
54. Other Black, Black unspecified
55. Chinese
56. Africa - colour not defined
57. Middle East

- 58. Vietnamese
- 59. Japanese
- 60. Filipino
- 61. Any Other Group
- 62. Buddhist
- 63. Hindu
- 64. Jewish
- 65. Muslim
- 66. Sikh
- 67. Arab
- 68. Kurdish

OTHER

- 85 Other answer – not codeable 01 to 68
- 86 Irrelevant response - not codeable 01 to 68

## CODE FRAME NUMBER 57

*Variable:* FqOQ

*Type:* Other-specify

*Question text:* What qualifications are these?

*Routing:* IF has obtained any further qualifications since they were last interviewed (FqMqua = 1)

**Back-code to FqQual when possible (codes 01 to 29)**

**MULTICODE – CODE ALL THAT APPLY**

- 01 Degree/degree level qualification (including higher degree)
- 02 Teaching qualification
- 03 Nursing qualifications SRN, SCM, SEN, RGN, RM, RHV, Midwife
- 04 HNC/HND, BEC/TEC Higher, BTEC Higher/SCOTTECH Higher
- 05 ONC/OND/BEC/TEC/BTEC not higher
- 06 City and Guilds Full Technological Certificate
- 07 City and Guilds Advanced/Final Level
- 08 City and Guilds Craft/Ordinary Level
- 09 A-levels/Higher School Certificate
- 10 AS level
- 11 SLC/SCE/SUPE at Higher Grade or Certificate of Sixth Year Studies
- 12 O-level passes taken in 1975 or earlier
- 13 O-level passes taken after 1975 GRADES A-C
- 14 O-level passes taken after 1975 GRADES D-E
- 15 GCSE GRADES A-C
- 16 GCSE GRADES D-G
- 17 CSE GRADE 1/SCE BANDS A-C/Standard Grade LEVEL 1-3
- 18 CSE GRADES 2-5/SCE Ordinary BANDS D-E
- 19 CSE Ungraded
- 20 SLC Lower

- |   |
|---|
| 21 SUPE Lower or Ordinary   |
| 22 School Certificate or Matric   |
| 23 NVQ Level 5  |
| 24 NVQ Level 4  |
| 25 NVQ Level 3/Advanced level GNVQ  |
| 26 NVQ Level 2/Intermediate level GNVQ                                    |
| 27 NVQ Level 1/Foundation level GNVQ                                      |
| 28 Recognised Trade Apprenticeship completed                              |
| 29 Clerical or Commercial Qualification (eg typing/book-keeping/commerce) |

- 51 Other - Qualifications outside the UK
- 52 Other - Other vocational qualifications not otherwise codeable
- 53 Other - NVQ level not specified
- 54 Other - Nursery nurse examination board qualification
- 55 Other - Qualification obtained during military service
- 56 Other - Diploma
- 57 Other - Other academic qualification not otherwise codeable
- 58 Other - Other professional qualification not otherwise codeable

OTHER

- 85 Other answer – not codeable 01 to 29 or 51-58
- 86 Irrelevant response - not codeable 01 to 29 or 51-58

## CODE FRAME NUMBER 58

*Variable:* **FqRetrx**

*Type:* Other - specify

*Question text:* Record reason why respondent refused retrospective interview

*Routing:* Respondents who answered 'Other reason (specify)' to FqRRetr

Back-code to **FqRRetr** when possible (codes 01 to 04)

<p>01 Given enough time already to this survey/expecting too much</p> <p>02 Too busy, cannot spare the time (if code 1 does not apply)</p> <p>03 Does not want to talk about the past/too personal</p> <p>04 Not interested/can't be bothered/no particular reason</p>
--

### OTHER

05 Not feeling well enough

06 Memory problems

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## CODE FRAME NUMBER 59

*Variable:* **MMRecRO**

*Type:* Other-specify

*Question text:* Interviewer: record type of floor surface

*Routing:* Interviewers who entered 'other' at MmRecR

**Back-code to MmRecR when possible (codes 01 to 04)**

01 Linoleum/tile/ wood

02 Low-pile carpet

03 Thick-pile carpet

04 Concrete

### OTHER

85 Other answer – not codeable 01 to 04

86 Irrelevant response - not codeable 01 to 04

## CODE FRAME NUMBER 60

*Variable:* **MmAidO**

*Type:* Other-specify

*Question text:* Interviewer: record what type of [walking] aid used.

*Routing:* Interviewers who entered 'other' at MmAid

**Back-code to MmAid when possible (codes 01 to 04)**

01 None
02 Walking stick or cane
03 Elbow crutches
04 Walking frame

### OTHER

85 Other answer – not codeable 01 to 04

86 Irrelevant response - not codeable 01 to 04

## CODE FRAME NUMBER 61

<i>Variable:</i>	<b>MMCom</b>
<i>Type:</i>	Open
<i>Question text:</i>	Provide details about why the walking test was not completed successfully eg why it was stopped for safety reasons, refused or not completed.
<i>Routing:</i>	All respondents eligible for the walking test who did not complete it.

### **MULTICODE – CODE ALL THAT APPLY**

01 Unable to walk (safely)

02 Lack of space

03 Respondent refused

04 Interview not completed

05 Respondent in pain

### OTHER

85 Other answer – not codeable 01 to 05

86 Irrelevant response - not codeable 01 to 05

## CODE FRAME NUMBER 62

*Variable:* **ScNoOth**

*Type:* Other-specify

*Question text:* Code why respondent did not complete self-completion

*Routing:* Interviewers who answered 'other' to ScNoSc

### **Back-code to ScNoSc when possible (codes 01 to 02)**

01 Refused

02 Unable

### OTHER

85 Other answer – not codeable 01 to 02

86 Irrelevant response - not codeable 01 to 02

## CODE FRAME NUMBER 63

*Variable:* **DtypOth**

*Type:* Other specify

*Question text:* Enter household dwelling type.

*Routing:* Respondents who said 'other' at DwelTyp

### **Back-code to DwelTyp when possible (codes 01 to 07)**

- 01 Whole house or bungalow – detached
- 02 Whole house or bungalow - semi-detached
- 03 Whole house or bungalow – terraced
- 04 Flat or maisonette in purpose built block - basement to 3rd floor
- 05 Flat or maisonette in purpose built block - 4th floor or higher
- 06 Flat or maisonette in a converted house or some other kind of building
- 07 Caravan, mobile home or houseboat

### OTHER

85 Other answer – not codeable 01 to 07

86 Irrelevant response - not codeable 01 to 07

## CODE FRAME NUMBER 64

*Variable:*           **Flexi**

*Type:*                Open

*Question text:*     Did you need to use any of the features of flexible interviewing?

*Routing:*            All asked

### **MULTICODE – CODE ALL THAT APPLY**

01 No / None

02 Chose not to interview 2 people concurrently

*e.g.1 I carried out separate interviews at separate times*

*e.g.2 I interviewed Mrs X first on her own as Mr X was out. Returned at a later date to interview Mr X.*

03 Deliberately selected alternative order which people entered a concurrent session

04 Carried out the housing or income and assets modules later in the interview or at a later date

05 Carried out the timed walk earlier or later than the first prompt

06 Changed the order of the questions (NOT CODEABLE TO 03 OR 05)

### **OTHER**

85 Other answer – not codeable 01 to 06

86 Irrelevant response - not codeable 01 to 06

## **SOC CODING**

*ELSA Variables:* WpAct, WpAway, Wpjob, Wpjobl, Wpstj, WpEmp, Wpever, Wpdet, WpJDo, Wpqual, WpSup, Wpmake, WpNEmp, Wpmaks, WpEmpl, WpES

*HSE Variables:* NActiv, Everjob, Jobtitle, Employe, JobT, WtWork, MatUsed, SkilNee, Ind, SLFWtMad, Econact, StWork, WkLook, WkStrt, OthPaid, FtPtime, Dirctr, EmpStat, NEmplee, SNEmplee

*Type of questions:* Open

*Edit task:* NS SEC / SOC 2000 coding

*Editors:*

*The ELSA job information appears on the fact sheet as  
Job details – WPDet – QInd: 1 or 2 or 3 Qre: 1 or 2 or 3*

## B. Editing instructions

Module	Question Name	Edit check	Instruction to editor
HHGrid	DhCDB	IF DhCDB=same as date of birth given for someone else in HH Grid.	Compare details of 2 people. If it is clear that it is the same person (i.e. same name and sex as well as same date of birth), change DhNCh to be one child less and delete answers from DhCNa to DhCAg for that child.
HHGrid	DhCR	IF relationship (DhCR) is not = 3/4/5/6.	Correct if possible (e.g. if coded as parent when is clear should be child), Otherwise flag to researcher.
HHGrid	DhNCh	IF = 0	Change DhCh to code 2 (No).
HE	HeFlb	IF=0	Change HeFla to code 2 (No) and delete answer to HeFlc.
WP	WplljY	IF WplljY is before respondents year of birth.	Correct if possible, check that there is no reason to suspect date of birth is incorrect, otherwise delete.
IA	ladebm	IF = 0	Changes laDebt to code 2 (No).

MM	MMWika MMWikb	If under 1 or over 10.	Correct is possible, otherwise flag to yellow team (?).
----	------------------	------------------------	---

LIST OF VARIABLES TO BE CODED EXTERNALLY:

Hedix (Natcen to check for backcoding, then to go to UCL)

Hedixa (UCL only)

Hedixb (UCL only)

# Wave 3 Pension Grid Derived Variables

*Dataset: wave\_3\_pensiongrid*

Three derived variables are included in the wave 3 pension grid to summarise the status of each pension. The Stata syntax for creating these variables can be found in the annex to this document. In cases where respondents disputed the existence of a pension which was fed forward from the previous interview (*wpprev* = "no"), this pension will still appear in the pension grid but the derived variables described below will take the value "-5" to indicate "disputed existence of pension".

The derived variables are as follows:

## ***demppen***

"Is/was this pension provided by your employer?"

This variable identifies whether or not the pension is or was operated by the individual's employer.

## ***ddbdc***

"Is/was this pension defined benefit or defined contribution?"

This variable identifies whether the pension is defined benefit or defined contribution in nature. Defined benefit pensions are ones in which the pension received is based on a formula involving age, years of service and salary. Defined contribution pensions are ones in which the pension contributions are put into a fund which grows over time and from which the pension received will depend on the size of the fund at the point of retirement.

The status of a pension may differ from that at wave 1 and/or wave 2 if an individual reported that his scheme rules had changed between waves (see variable *wpsrul*).

## ***dcurpen***

"Status of pension scheme membership"

This variable indicates whether the individual was currently contributing to the pension, receiving an income from it, or had retained rights to it in wave 3. This variable identifies those pensions which will be followed up at wave 4 (all those for which *dcurpen* takes the values 1, 2 or 3). Other pensions (in particular those from which the individual had received a lump-sum refund of contributions or from which he had transferred the funds to a different pension scheme) will not be followed up at wave 4.

## Appendix – Stata code

```
gen demppen = 1 if wppent==1
replace demppen = 0 if wppent>1
replace demppen = -8 if wppent==-8|wppent==-1
replace demppen = -9 if wppent==-9
replace demppen = -5 if wpprev==-9|wpprev==-8|wpprev==2|wpprev==3
label define demppen -9 "Refused" -8 "Don't know" -5 "Disputed existence of pension" 0 "No" 1 "Yes"
label val demppen demppen
label var demppen "Is/was this pension provided by your employer?"

gen ddbdc = 1 if wpffcurp==1 & wppent>1
replace ddbdc = wppent if wpffcurp==1 & (wppent==-8|wppent==-9)
replace ddbdc = wpffdcdb if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==2 & (wpffdcdb==1|wpffdcdb==2)
replace ddbdc = wpdps if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==2 & (wpdps==1|wpdps==2|wpdps==-8|wpdps==-9)
replace ddbdc = -8 if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==2 & wpdps==3
replace ddbdc = wpdps if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==1 & (wpdps==1|wpdps==2|wpdps==-8|wpdps==-9)
replace ddbdc = -8 if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==1 & wpdps==3
replace ddbdc = wpffdcdb if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==3
replace ddbdc = wpdps if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==-8 & (wpdps==1|wpdps==2|wpdps==-8|wpdps==-9)
replace ddbdc = -8 if wpffcurp==1 & wppent==1 & wpcurr==1 & wpsrul==-8 & (wpdps==3|wpdps==-1)
replace ddbdc = wpffdcdb if wpffcurp==1 & wppent==1 & wpcurr~1 & (wpffdcdb==1|wpffdcdb==2)
replace ddbdc = wpdpsp if wpffcurp==1 & wppent==1 & wpcurr~1 & (wpdpsp==1|wpdpsp==2|wpdpsp==-8|wpdpsp==-9)
replace ddbdc = -8 if wpffcurp==1 & wppent==1 & wpcurr~1 & wpdpsp==3
replace ddbdc = 1 if wpffcurp==2 & wppent>1
replace ddbdc = wppent if wpffcurp==2 & (wppent==-8|wppent==-9)
replace ddbdc = wpffdcdb if wpffcurp==2 & wppent==1 & (wpffdcdb==1|wpffdcdb==2)
replace ddbdc = wpdpsp if wpffcurp==2 & wppent==1 & (wpdpsp==1|wpdpsp==2|wpdpsp==-8|wpdpsp==-9)
replace ddbdc = -8 if wpffcurp==2 & wppent==1 & wpdpsp==3
replace ddbdc = 1 if wpffcurp==-1 & wpprev~-1 & wppent>1
replace ddbdc = wppent if wpffcurp==-1 & wpprev~-1 & (wppent==-8|wppent==-9)
replace ddbdc = wpffdcdb if wpffcurp==-1 & wpprev~-1 & (wpffdcdb==1|wpffdcdb==2)
replace ddbdc = wpdpsp if wpffcurp==-1 & wpprev~-1 & (wpdpsp==1|wpdpsp==2|wpdpsp==-8|wpdpsp==-9)
replace ddbdc = -8 if wpffcurp==-1 & wpprev~-1 & wpdpsp==3
replace ddbdc = -8 if wpffcurp==-1 & wpprev~-1 & wppent<0
replace ddbdc = 1 if wpprev==-1 & wppent>1
replace ddbdc = wpdps if wpprev==-1 & wpcurr==1 & (wpdps==1|wpdps==2|wpdps==-8|wpdps==-9)
replace ddbdc = -8 if wpprev==-1 & wpcurr==1 & wpdps==3
replace ddbdc = wpdpsp if wpprev==-1 & wpcurr~1 & (wpdpsp==1|wpdpsp==2|wpdpsp==-8|wpdpsp==-9)
replace ddbdc = -8 if wpprev==-1 & wpcurr~1 & wpdpsp==3
replace ddbdc = -8 if wpprev==-1 & (wppent==-8|wppent==-9)
replace ddbdc = -5 if wpprev==2|wpprev==3|wpprev==-8|wpprev==-9
label define ddbdc -9 "Refused" -8 "Don't know" -5 "Disputed existence of pension" 1 "DC" 2 "DB"
label val ddbdc ddbdc
label var ddbdc "Is/was this pension defined contribution or defined benefit?"

gen dcurpen = 1 if wpffcurp==1 & wpprev==1 & wpcurr==1
replace dcurpen = 2 if wpffcurp==1 & wpprev==1 & (wpcurr==2|wpcurr==-8|wpcurr==-9) & wprec==1
```

```

replace dcurpen = 3 if wpffcurp==1 & wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprghx==1
replace dcurpen = 4 if wpffcurp==1 & wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprghx==2
replace dcurpen = 5 if wpffcurp==1 & wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprghx==3
replace dcurpen = 6 if wpffcurp==1 & wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprghx==4
replace dcurpen = wprghx if wpffcurp==1 & wpprev==1 & wpcurr==2 & wprec==2 & (wprghx==8|wprghx==9)
replace dcurpen = -8 if wpffcurp==1 & wpprev==1 & wpcurr==2 & wprec==8 & (wprghx==8|wprghx==9)
replace dcurpen = -8 if wpffcurp==1 & wpprev==1 & wpcurr==8 & wprec==2 & (wprghx==8|wprghx==9)
replace dcurpen = -8 if wpffcurp==1 & wpprev==1 & wpcurr==8 & (wprec==8|wprec==9)
replace dcurpen = -9 if wpffcurp==1 & wpprev==1 & wpcurr==2 & wprec==9 & (wprghx==8|wprghx==9)
replace dcurpen = -9 if wpffcurp==1 & wpprev==1 & wpcurr==9 & wprec==2 & (wprghx==8|wprghx==9)
replace dcurpen = -9 if wpffcurp==1 & wpprev==1 & wpcurr==9 & (wprec==8|wprec==9)
replace dcurpen = 2 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==1
replace dcurpen = 3 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==2 & wprghx==1
replace dcurpen = 4 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==2 & wprghx==2
replace dcurpen = 5 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==2 & wprghx==3
replace dcurpen = 6 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==2 & wprghx==4
replace dcurpen = -8 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==2 & wprghx==8
replace dcurpen = -8 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==8
replace dcurpen = -9 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==2 & wprghx==9
replace dcurpen = -9 if (wpffcurp==2|(wpffcurp==1 & wpprev==1)) & wpprev==1 & wprec==9
replace dcurpen = 1 if wpprev==1 & wpcurr==1
replace dcurpen = 2 if wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprec==1
replace dcurpen = 3 if wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprec==2 & wprghx==1
replace dcurpen = 4 if wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprec==2 & wprghx==2
replace dcurpen = 5 if wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprec==2 & wprghx==3
replace dcurpen = 6 if wpprev==1 & (wpcurr==2|wpcurr==8|wpcurr==9) & wprec==2 & wprghx==4
replace dcurpen = wprghx if wpprev==1 & wpcurr==2 & wprec==2 & (wprghx==8|wprghx==9)
replace dcurpen = wprec if wpprev==1 & wpcurr==2 & (wprec==8|wprec==9)
replace dcurpen = wpcurr if wpprev==1 & (wpcurr==8|wpcurr==9)
replace dcurpen = -5 if wpprev==9|wpprev==8|wpprev==2|wpprev==3
label define dcurpen -9 "Refused" -8 "Don't know" -5 "Disputed existence of pension" 1 "Currently contributing" ///
2 "Receiving pension income" 3 "Retained rights" 4 "Transferred rights to another scheme" ///
5 "Received lump sum refund of contributions" 6 "Has stopped receiving pension from this scheme"
label val dcurpen dcurpen
label var dcurpen "Status of pension scheme membership"

```