

Student Income and Expenditure Survey 2007/08 *Technical Report*

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1 BACKGROUND TO THE STUDY

This is a report on the research methods used in the Student Income and Expenditure Survey 2007/08 (SIES 2007/08) carried out on behalf of the Department for Innovation, Universities and Skills (DIUS) and the Welsh Assembly Government (WAG).

1.1 Background to the study

SIES is a large-scale comprehensive survey that collects detailed information on income and expenditure of higher education (HE) students and investigates associated issues such as student debt and hardship.

The 2007/08 survey is the latest in a series of surveys carried out at approximately three-year intervals, and its methods and design drew heavily from the baseline study carried out in 2004/05. The 2004/05 study had differed in key ways from its predecessors. In particular the 2004/05 study used a different sampling methodology, the interview content was very different, Open University (OU) students were included for the first time, there were alternative options open to respondents completing the spending diary and incentives were used to maximise response.

For the 2007/08 study, the methods and interview content were kept as similar as possible to the previous wave, in order to make any trend comparisons as robust as possible. Some updating of the interview content was necessary, in order to reflect the changes in the student support system that were introduced in 2006.

1.2 Collaboration

As for 2004/05, the National Centre for Social Research (NatCen) and the Institute for Employment Studies (IES) conducted the 2007/08 SIES in close collaboration.

NatCen had overall responsibility for the delivery of the survey, lead responsibility for the sample design, questionnaire design, fieldwork with students and data preparation. IES had lead responsibility for collecting sample data from institutions, and data analysis and report writing.

1.3 Overview of methodology

Later sections of this technical report give detailed descriptions of all aspects of the survey and data collection, including the development phases. However, in order to give an overview of the research process, the key activities within the main stage of the survey are outlined here, with the overall project timetable shown in Table 1.1 overleaf.

Table 1.1 Project timeline

Quarter	Task
April – June 2007	Start of the contract Initial contact with institutions
July – September 2007	Development of interview questionnaire and expenditure diary (for pilot) Opt-in questionnaire finalised for main-stage Recruitment of institutions for mainstage
October – December 2007	Dress rehearsal pilot of opt-in procedures, interview and diary Initial contact with students (opt-in stage) Interview questionnaire and expenditure diary finalised for main-stage
January – March 2008	Main-stage fieldwork: face to face interviews with students and diary completion
April – June 2008	Data editing, coding and checking Preliminary analysis of the dataset
July – December 2008	Main analysis and report drafting
January – March 2008	Finalisation of report

As for 2004/05, interviews for students were carried out during January-March (broadly corresponding to the Spring Term in the academic year). This was felt to be the optimum time for interviewing students as it allowed sufficient time for enrolment databases for the academic year to be finalised (which was particularly important in covering first-year students fully) but did not clash with major examination periods.

1.3.1 Sampling — selection of institutions

NatCen selected a number of institutions in England and Wales based on Higher Education Statistics Agency (HESA)¹ figures about the student populations at each.

¹ Learning and Skills Council (LSC) Learner Record data were used to provide FEC information.

Letters were sent from DIUS and WAG to the Vice Chancellors and Principals at selected institutions containing information about the research and an invitation to take part (see Appendix B).

IES made individual contact with institutions, explained their role in sampling and contacting students and secured their agreement to take part.

1.3.2 Sampling — selection of students and opt-in stage

NatCen identified the numbers of full-time and part-time students to be sampled from each institution taking part (numbers differed by type and country of institution). IES instructed institutions about the numbers of students to sample and helped institutions to do this using random selection.

Institutions produced a list of sampled students and two sets of labels containing names and addresses. They then attached labels to pre-prepared 'opt-in' packs and posted these packs to the selected students.

Students each received an initial opt-in pack with an ID number, containing a letter explaining about the survey and what their involvement would consist of, a short opt-in questionnaire and £3 of Love2Shop vouchers to thank them for their time and encourage their involvement. Items included in the opt-in pack can be found in Appendix B.

Institutions posted 'reminder' opt-in packs to all students to encourage those who had not yet returned the opt-in questionnaire (containing a letter and opt-in form, but no vouchers; see Appendix B).

Students returned opt-in questionnaires to NatCen (although not all gave contact details and consent to be re-contacted). All returned questionnaires were keyed. NatCen then selected students for interview based on their consent to be re-contacted, availability of contact details and their eligibility for the study based on answers given to questions in the opt-in form (e.g. the qualification towards which students were working and their country of domicile). The database was also checked for any duplicate returns, which were excluded.

1.3.3 Fieldwork and data collection

Students selected for interview were sent a letter in advance letting them know an interviewer would contact them (Appendix B).

Interviewers contacted students and carried out face-to-face interviews using a computer assisted personal interview (CAPI) on a laptop. All students giving an interview were asked to complete a seven-day diary of spending (see Appendix G). Interviewers instructed students how to complete the diary at the end of the interview. There was also an Internet version of the diary which students could complete instead of the paper version if they preferred. Interviewers made a reminder (phone) call and attempted a pick-up visit for the diary.

Students completing and returning a diary were sent a letter and £12 of Love2Shop vouchers to thank them for their help with the study (Appendix B).

2 SAMPLING

2.1 Background and overview of the sampling methodology

The sample design of this survey was very similar to that used for the 2004/05 survey (although the 2004/05 design was substantially altered from that of earlier surveys in the SIES series).

For the study, the student sample was obtained using an opt-in process.

Institutions were asked to draw a random sample of the student populations of interest and mail survey materials supplied by the researchers to the selected students. The mailing packages included an opt-in questionnaire which the students were invited to fill in, providing some key characteristics and contact details. Students indicated on the questionnaire whether they gave consent to be re-contacted for the research, and then returned them directly to the researchers. The sample for the interview stage was then drawn from the returned questionnaires of eligible students who had opted in. This methodology had proved feasible in 2004/05.

The details of the design were complex and a full account of each stage is given in the following sections. In the remainder of this section, we give an overview of the approach.

In total, the survey was designed to include 63 higher education institutions (HEIs) (53 in England and 10 in Wales), 20 further education colleges (FECs) and the Open University (OU).

The eligibility definition² for the survey specified that students had to be English- or Welsh-domiciled; studying at an English or Welsh HEI or FEC, or the OU; studying for a higher education qualification (namely a first degree, foundation degree, PGCE/ITT, Dip HE, HND, HNC, Certificate of Higher Education, or University Certificate or Diploma) and studying full-time or if part-time for 50% or more of the full-time equivalent course.

Each participating HEI in England was asked to draw a sample of 305 students, comprising (up to) 4 discrete samples of full-time English-domiciled students, full-time Welsh-domiciled students, part-time, and (where applicable) medical students. HEIs in Wales were asked to select a slightly larger sample of 495 students, again comprising (up to) 4 discrete samples.³ Medical and part-time students were also oversampled to ensure sufficient numbers for analysis.

Each participating FEC was asked to sample 100 of their students on higher education courses who were eligible for the survey. The OU was also included in the sample, and asked to select 500 eligible students.

² Two other groups (sandwich students on their paid placement year, and students on a foreign placement) were also excluded for practical reasons.

³ The projected sample sizes for English HEIs were smaller than those in the 2004/05 study, while the projected Welsh HEI sample was larger.

In general, HESA counts were used as a guide for determining the numbers of students to be selected from each sample group. In practice, however, the HESA counts often differed from the numbers of students from whom institutions actually selected, and this meant that selection probabilities could vary.

2.2 Piloting the opt-in phase

2.2.1 Pilot of sampling processes

The piloting involved four institutions, three HEIs and one FEC (none of which had any medical students). The pilot aimed to identify any problems which might arise in the selection of students and the opt-in forms and processes. The main difference for institutions from 2004/05 was that they were asked to mail out different (coloured) envelopes/questionnaires to the different sample groups (i.e. English-domiciled full-time, Welsh-domiciled full-time and part-time). As the mailings were undertaken in July/August during the summer vacation, the pilot could not test response rates (as the mainstage mailing would take place during term-time).

The findings of the pilot showed that the basic sampling method was still feasible and acceptable to institutions. The piloting had also tested the feasibility of pre-printing institutional details and serial numbers on the questionnaires, and suggested some refinement of the logistical aspects of the mail-out process (e.g. the order in which documents were packed by the printer for mail-out). Broadly, the mail-out process was found to work well.

2.2.2 Inspection of opt-in questionnaires

In total, 114 completed forms were returned to NatCen as part of the pilot (41, 30 and 24 from the 3 HEIs and 19 from the FECs). Of these, 96 students gave their consent to the study and fulfilled the eligibility criteria.

Although it was not feasible to contact opt-in respondents for their views on the questionnaire, completed returns were inspected. A couple of minor amendments were made, namely to update the initial question about payment of fees, and to refine the code frame for previous qualifications.

2.3 Selecting and approaching institutions and students

2.3.1 Selecting institutions and allocating numbers of students to select

The target numbers of institutions for the study were 53 English HEIs, 10 Welsh HEIs, 20 FECs and the OU.

The sample selection was divided into three main subgroups of institution: English HEIs, Welsh HEIs, and English FECs. Within these separate samples were selected across a number of student groups: medics; English-domiciled full-time; Welsh-domiciled full-time and part-time.

English HEIs

For English HEIs our aim was to select a total of 16,165 students from 53 institutions, with the 16,165 divided as

- 420 medical students;
- 4,040 part-time students;
- 800 Welsh-domiciled full-time students; and
- 10,905 English-domiciled full-time students.

Students in each of these groups were to be selected with as close to equal probability as possible (at least for the non-medical groups), but with each institution contributing a total sample of 305.

In practice this meant selecting English-domiciled full-time students with a sampling fraction of about 1 in 78, Welsh-domiciled full-time students with a sampling fraction of about 1 in 23, and part-time students with a sampling fraction of about 1 in 32. In order to approximate equal probability samples for a two-stage sample we selected the 53 HEIs with probability proportional to a weighted size:

$$(Full-time\ English * 0.442) + (full-time\ Welsh * 1.398) + (part-time)$$

where the weights are based on the desired sampling fraction relative to the sampling fraction for part-time students. The counts of students in the sum were based on 2005/06 HESA returns.

Institutions were selected from a stratified (sorted) list: sorted firstly by Government Office Region, then by whether pre- or post-1992, and finally by weighted size. A cumulative size column was also constructed, and a sampling interval calculated by dividing the total (cumulative) size of all institutions by the number of institutions to be selected. The 53 HEIs were then selected systematically from the sorted list using a random start (i.e. if n = the random start and k = the sampling interval, then the institutions containing the n th student, the $n+k$ th student, the $n+2k$ th student etc were selected).

In practice 6 HEIs proved to be large enough to give selection with certainty (i.e. their weighted size was larger than the sampling interval). Only the remaining 47 were selected with probability strictly *proportional* to weighted size.

Although the 53 institutions were selected based on probability sampling methods, procedures were put in place to replace any institutions that dropped out of the study at an early stage with another, similar, HEI. This was achieved by selecting, at random, either the HEI immediately before the original HEI in the sorted list, or the one immediately after.

As noted above, the aim was to select 305 students within each of the 53 HEIs selected, with an overall sample of approximately:

- 420 medical students;
- 4,040 part-time students;
- 800 Welsh-domiciled full-time students; and
- 10,905 English-domiciled full-time students.

In practice this meant allocating 305 students across the three non-medical groups in those HEIs *without* a medical school; and allocating 270 students across these three groups for the 12 HEIs *with* a medical school (with the remaining 35 selected as medical students).

This was achieved as follows:

- For part-time students we set the initial sample size per HEI proportionate to the part-time component of the weighted sum (i.e. $N \cdot pt / wtsum$ where $N=305$ or 270)
- But as this gave slightly fewer than the 4,040 required we scaled up all the part-time sample counts by 1.1 to reach 4,040.
- For the Welsh-domiciled, we set the sample size proportionate to the Welsh component of the weighted sum (i.e. $N \cdot Welsh \cdot 1.398 / wtsum$).
- As this gave some HEIs with a Welsh-domiciled sample of just 1 or 2, the minimum sample size was set to be 5. This gave 817 in total.
- Finally, we set the English-domiciled full-time count so that the total for the HEI added to 305.

Welsh HEIs

For Welsh HEIs, the aim was to select 4,950 students overall, divided as

- 1,980 part-time students
- 2,240 Welsh-domiciled full-time students
- 730 English-domiciled full-time students

This equates to sampling fractions of 1 in 38 for English-domiciled full-time students; 1 in 14 for Welsh-domiciled full-time students and 1 in 4 for part-time students.

To generate a sample with these approximate sampling fractions ten (out of 12) Welsh HEIs were (in principle) to be selected with probability proportional to:

$$(Full-time\ English \cdot 0.103) + (full-time\ Welsh \cdot 0.275) + (part-time).$$

In practice 9 HEIs proved to be large enough to give selection with certainty (i.e. their weighted size was larger than the sampling interval). Only the remaining one was selected with probability strictly *proportional* to weighted size.

Within each Welsh HEI, 495 students were selected. This was achieved as follows:

- For part-time students we set the initial sample size per HEI proportionate to the part-time component of the weighted sum (i.e. $495 \cdot pt / wtsum$)
- This gave slightly fewer than the 1,980 required; so the part-time sample counts were scaled up by 1.07 to reach 1,980.
- For full-time Welsh-domiciled, we set the initial sample size proportionate to the Welsh full-time component of the weighted sum (i.e. $495 \cdot Welsh \cdot 0.275 / wtsum$).
- This gave slightly more than the 2,240 required; so we scaled down all the sample counts by 0.95 to reach 2,240.
- Finally, we set the English-domiciled full-time count so that the total for the HEI added to 495.

FECs

The Learning and Skills Council data we had for FECs on HE students was of rather poorer quality than the HEI data: although we had a total number of HE students many of these are in an 'unknown' category which did not allow us to quantify the number of full-time and part-time students per FEC. To allow for this we made *estimates* of the full-time and part-time numbers per FEC, so that we could draw a reasonable sample. But the uncertainty in the numbers means that the probabilities of selection for the final sample of FEC students are more variable than might have been the case with precise counts.

In practice we estimated the total number of full-time students per FEC as the specified 'known' number plus 50% of the unknowns, and similarly for part-time. (The 50% was derived from the fact that, for the 'knowns' the split between full-time and part-time was approximately 50:50.)

FECs with fewer than 100 HE students were excluded from the sampling frame. This means excluding 34% (n=127) of colleges, but just 3% of HE students.

Twenty FECs were selected from the remaining 252. For the 252 the number of full-time students was estimated at 64,665, and the number of part-time students as 64,040. The FECs were selected with probability proportional to:

$$(Full-time*2)+part-time.$$

The 20 were selected from a stratified (sorted) list, sorted firstly by Government Office Region, then by weighted size. The 20 FECs were selected systematically from the sorted list using a random start.

Within each of the 20 FECs 100 students were selected, to generate an overall sample of approximately:

- 1,333 full-time students
- 667 part-time students

This was achieved as follows:

- For part-time students we set the sample size per FEC proportionate to the part-time component of the weighted sum (i.e. $100 * pt/wtsum$)
- But this gave slightly fewer than the 667 required; so we scaled up all the part-time sample counts by 1.1 to reach 667.
- Finally we set the full-time sample size equal to $100 - (pt \text{ sample size})$.

As with English HEIs, FECs that were selected but did not wish to take part in the survey were replaced with a 'similar' FEC. The 'reserve' FEC was selected at random from the FECs immediately before and after the original FEC in the sorted list. More replacements were used for FECs than for HEIs (see Section 2.3.2 for more details).

The OU

A separate sample of 500 part-time students studying at the OU was obtained directly from the OU. The sample was designed to closely resemble the part-time student population eligible for the study, rather than to represent the overall OU population. Our sample was drawn from the group of students who fulfilled all of the following criteria: those working

towards a named qualification (either a first degree, foundation degree, PGCE or ITT, Dip HE, Cert HE, HND or HNC); working towards a qualification that made them eligible for support (registered for one or more courses worth at least 60 credits which equates to 50 per cent FTE); and resident in England or Wales only. The sample included new and continuing students, and was drawn from those with October 2007 starts. It should be noted that the sample is therefore not representative of OU students as whole.

2.3.2 Approaching institutions

As a first step, a letter signed by the Minister of State for Education and Lifelong Learning was sent (in May 2007) to the vice-chancellors or principals of all HEIs (not just those selected) and to the selected FECs. This informed them about the study and asked them for their help if they were selected. In July 2007, further information about the study was sent to all selected institutions, containing an agreement form to be faxed back if the institution could take part, along with information such as the main contact person. IES also liaised extensively with institutions in this period to answer any general queries about the study as well as specific questions on how to sample students for the study. In total, 108 institutions were followed up by the IES research team.

Eighty institutions (including the OU) eventually took part in the research (Table 2.1). The participation rate for HEIs was very high: no Welsh and only two English HEIs had to be replaced, while 3 English HEIs dropped out at a late stage of the project, when it was too late to replace them. A relatively high number of replacement FECs were used. This was primarily because many FECs did not have sufficient numbers of students studying for higher educational qualifications to be eligible for the study. (In addition to the numbers shown in the table, a number of other FECs were contacted as potential replacements, but did not satisfy the eligibility criteria.) One FEC also dropped out at a late stage of the study, and could not be replaced. The OU also consented to take part in the study.

A list of the institutions that took part in the survey can be found in Appendix A.

Table 2.1 Co-operation by institutions

	English HEIs	Welsh HEIs	English FECs	OU	Total
Originally issued	53	10	20	1	84
Reserves used	2	0	9	n/a	11
Agreeing to take part	53	10	20	1	84
Actually taking part	50	10	19	1	80

Base: Institutions agreeing to take part in SIES 2007/08

One issue arose (primarily amongst FECs) of merging institutions. For this scenario, an institution was retained if it had merged with a smaller institution, but dropped (and replaced) if it had been absorbed by a larger institution.

2.3.3 Selecting and approaching students (opt-in stage)

Random selection

Written instructions were sent to institutions on how to draw separate random samples of qualifying students. An Excel spreadsheet designed by NatCen was also provided to assist institutions with this task.

In English HEIs, the total number of students selected per HEI was 305. In most cases just three separate samples were drawn: full-time English-domiciled, full-time Welsh-domiciled and part-time students, with the numbers assigned in advance for each institution by the research team. A definition for part-time students eligible for selection was given to institutions: they had to be 50%+ full-time equivalent students. An additional sample group – medical students - was defined for English HEIs with a medical school and for these institutions 35 of the 305 students chosen were medical students.

In Welsh HEIs the process was the same but the total was 495 rather than 305 and no medical student group was defined.

The process was also similar for FECs, where 100 students were selected per institution. In practice, only 2 sample groups were requested: full-time (English-domiciled) and part-time students.

In a small number of institutions, fewer students were selected than requested, as occasionally the number of students specified for selection in a particular group was higher than the total number of students at the institution in that group. A total of 22,465 students was sampled by institutions for the opt-in process.⁴

In contacting institutions, IES researchers found that there were potential difficulties caused by franchised students (i.e. taught at the institution but registered elsewhere), which was a particular issue for FECs. Institutions were told to include students registered at the sampled institution, even if they were taught elsewhere (so long as this is within England or Wales) but exclude students taught at the institution but registered elsewhere. This gave the closest correspondence to their treatment in the HESA statistics which had been used as the original guide in deciding numbers of students to sample.

Although the sample was designed to minimise the variation in the probabilities of selection for the full-time and part-time opt-in samples, in practice a lot of variation did result. The reasons for this are as follows:

- the HESA full-time and part-time counts did not match the counts found at sampling particularly well (especially the part-time counts). This meant that the sampling fractions used within institutions were often very far from what was anticipated
- some HEIs were selected with certainty. To equalise sampling probabilities these institutions would have had to select a larger sample of students. Equalising the burden on institutions took precedence over equalising the sampling probabilities
- the allocation of part of the sample to medical students reduced the probability of selection for other students in some HEIs.

⁴ Some institutions did not return information about how many students had actually been selected, so for these institutions it is assumed that the full numbers were selected.

Opt-in mailings and response rates

In October 2007, institutions who had agreed to take part in the study were sent packages containing the student opt-in packs to be mailed out. Students were sent two mailings by their institutions. The initial mailing package included an opt-in questionnaire which requested some key characteristics and contact details, and asked that students indicate whether they gave consent to be re-contacted for the research (Appendix B). A £3 incentive was included to help encourage response. A second mailing, which institutions were asked to send two weeks later to all selected students, contained a reminder letter and second copy of the opt-in questionnaire. Students were sent differently coloured questionnaires depending on which sample group they had been drawn from, pre-printed with a serial number and institutional details. This meant that the sample group a student was drawn from could be identified (an improvement from the 04/05 study).

Welsh HEIs received all materials translated into English and Welsh, and their mailing contained English and Welsh language versions of the covering letters and questionnaires.

Institutions were asked to send two mailings out in October/November to students' term-time addresses. The majority of institutions (57) managed to do this. Of the remainder, 17 had to do the reminder mailing in December and 2 had already notified researchers that a reminder mail-out was not possible. In addition, 3 institutions had to make their initial mail-outs in December or during the Christmas holidays to home addresses. These delays to mailings mainly occurred because enrolment databases had not been finalised, or because there were difficulties with staffing in the busy start-of-year period.

Table 2.2 shows the final opt-in return rates, by type of institution. In all, 6,656 opt-in returns were received, or approximately 30% of those despatched⁵. The number of returns was lower than originally hoped for, particularly in comparison to the 2004/05 study when 45% of forms had been returned. As a result of this, the deadline for receiving forms was put back (from the beginning of December to the beginning of January), to accommodate late mailings. A higher proportion of Welsh HEIs mailed out late so for three Welsh HEIs, additional returns were added in to the sample at the end of January. However, this was not logistically possible for all institutions.

As in 2004/05, the rate of return varied greatly by institution. Excluding non-mailers, the proportion of forms returned varied from 8% to 45%. Although late mailing institutions tended to have lower response rates (as some returns only arrived after the latest possible cut-off date), variation in response rates was also observed among institutions which mailed out earlier (where the cut-off had little or no effect in terms of excluding any returns). For example, among institutions which mailed out before the middle of November the response rates varied from 15% to 45%. This suggests institutional factors still played a part in influencing return rates. These factors could include out of date or incomplete student contact details and errors in the mailing process (for example mailings sent in the wrong order or without postage). However, although it seemed likely that the mailings did not reach all sampled students, the research team did not have access to information that would allow it to identify what the shortfall in coverage was.

⁵ Percentage of forms received based, where information was received, on the numbers of forms institutions said they had sent out, rather than the number originally requested.

Opt-in returns were checked (using Access) to identify any duplicate responses based on the student's name, sex and date of birth. A small number of forms (3%) were identified as duplicates.

Table 2.2 Opt-in return and consent rates

	English HEIs	Welsh HEIs	English FECs	OU	All
Number despatched (actual)	15,220	4,916	1,829	500	22,465
Number returned	4,423	1,474	534	225	6,656
<i>% returned</i>	29%	30%	29%	45%	30%
<i>Minimum return rate</i>	8%	23%	15%	-	8%
<i>Maximum return rate</i>	43%	38%	43%	-	45%
Duplicates	150	48	20	8	226
<i>% duplicates, of all returned</i>	3%	3%	4%	4%	3%
Number consenting to contact	3,555	1,150	4,36	185	5,326
<i>% consenting, of all returned</i>	80%	78%	82%	82%	80%
<i>% consenting, of all despatched</i>	23%	23%	24%	37%	24%

Base: Institutions participating in SIES 2007/08. Figures include all returns received by beginning of January, and additional late returns accepted for three Welsh HEIs.

Of those students returning a questionnaire, 5,326 consented to be contacted and gave contact details, i.e. approximately 80% of forms returned or 24% of students sampled and sent a form by their institution. This return rate was lower than expected, particularly compared to the return rates in 2004/05 (when 35% of forms despatched had resulted in a consenting student). The downward trend in the response rates means that any future use of opt-in methods for this study should be carefully reviewed.

There was little variation in the return and consent rates between English and Welsh HEIs and FECs, although OU students did have higher rates of return.

2.3.4 Selecting and approaching students (interview stage)

As well as consenting to be contacted, students who were allocated for the main survey needed to be identified as eligible for the study according to the information they gave in the opt-in questionnaire. Although instructions to institutions had been designed to exclude some of these groups, institutions were not always able to do so.

Ninety per cent of consenting students were classified as eligible and 10% as ineligible (Table 2.3). This was slightly higher than the figure in 2004/05 (86%). Overall, the proportion of sampled students who consented and were eligible was 20%.

The OU had the highest rates of ineligibility (19%), while FECs had the lowest (7%). The main causes of ineligibility were:

- part-time students (other than PGCE/ITT students) who reported that they already had a degree (6% of consenting returns, and a particular factor in OU ineligibility)
- students who reported studying for a postgraduate qualification other than a teaching qualification (3%)
- sandwich students who were in their placement year (2%).

Table 2.3 Eligibility rates

	English HEIs	Welsh HEIs	English FECs	OU	All
Number consenting to contact	3,555	1,150	436	185	5,326
Number eligible for study	3,196	1,023	405	149	4,773
<i>% eligible of consenting</i>	<i>90%</i>	<i>89%</i>	<i>93%</i>	<i>81%</i>	<i>90%</i>
Number not eligible for study	356	126	31	36	549
<i>% not eligible of consenting, of which:</i>	<i>10%</i>	<i>11%</i>	<i>7%</i>	<i>19%</i>	<i>10%</i>
- <i>part-time with degree (exc PGCE)</i>	<i>5%</i>	<i>7%</i>	<i>4%</i>	<i>16%</i>	<i>6%</i>
- <i>postgraduate qualification</i>	<i>3%</i>	<i>4%</i>	<i>*</i>	<i>1%</i>	<i>3%</i>
- <i>sandwich student in placement year</i>	<i>2%</i>	<i>1%</i>	<i>2%</i>	<i>1%</i>	<i>2%</i>
- <i>not domiciled in England or Wales</i>	<i>1%</i>	<i>*</i>	<i>1%</i>	<i>2%</i>	<i>1%</i>
- <i>qualification below degree level</i>	<i>*</i>	<i>1%</i>	<i>*</i>	<i>1%</i>	<i>*</i>
Number issued for study	3,194	1,018	405	149	4,766
Target issued number for study	2,836	1,314	565	241	4,956

Base: Students responding to opt-in stage of SIES 2007/08. * indicates <0.5%. The number issued is slightly lower than the number eligible as a small number of students were excluded because they were not available during the fieldwork period (mainly because they were studying abroad).

These patterns were very similar to those observed in 2004/05. Very few students were ineligible because they were domiciled outside England and Wales or studying for a qualification below degree level, suggesting that institutions were better equipped to exclude these groups than in 2004/05.

The design had sought to generate a larger sample of consenting and eligible students, both to give some contingency and to allow some lower incidence groups to be over-sampled. Due to the lower than expected response rate however, there was no spare capacity and all

consenting and eligible returns had to be issued for interview. A few cases had to be excluded at a later stage, for other reasons (mainly because they were studying abroad during the fieldwork period).

In total, 4,766 students were issued for interview⁶. This comprised higher than expected numbers of students at English HEIs, but lower than expected numbers for students at other types of institution. The bulk of the sample was issued for interview in mid-January but an additional sample of Welsh HEI students was issued at the end of January.

⁶ After issuing for interview, a further 8 cases were discovered to be duplicates. These were students who had returned the form twice, but where the date of birth or other details had been recorded differently on the duplicate forms, hence they were not picked up in the main duplicate checks.

3 QUESTIONNAIRE AND DIARY OF SPENDING DEVELOPMENT

All students – whether at a higher education institution (HEI), further education college (FEC) or the Open University – were interviewed using the same methods. First, there was a face-to-face interview using computer assisted personal interview (CAPI) methods. All students were then asked to complete a seven-day diary of spending after the interview, which could be filled in on paper or online.

The combination of the main questionnaire and the seven-day diary of spending meant that all areas of income and spending could be monitored. For example the questionnaire was able to pick up on larger and more memorable spending such as rent, travel, childcare, maintenance and holidays whilst day-to-day spending on items such as food and entertainment was recorded in the diary of spending.

An important feature of the study was to measure trends since 2004/05. For this reason, a deliberate attempt was made to keep the interview and diary instruments as similar as possible to the last study. However, amendments were needed, for the following main reasons:

- The student support system had undergone considerable reform (mainly in 2006). Student Loans for Fees were introduced to help students pay for the newly introduced variable tuition fees. Institutions could now charge up to a maximum of £3,070 for tuition fees (a rise on previous levels), and were obliged to offer bursary support to lower-income students. The sample included both ‘new system’ students on the post-2006 funding regime and ‘old system’ students who were still on the old funding regimes (but who could access elements of the new system as well). To accommodate these changes, new and amended information had to be collected in relation to tuition fees and fee support.
- There were a number of other smaller reforms (e.g. the withdrawal of the Higher Education Grant) that required questions to be deleted, added or amended.
- Based on the experiences of the 2004/05 study, a small number of improvements had been noted. These mainly related to a question about income from work, and the addition of two diary categories related to parking.

3.1 Questionnaire development

3.1.1 *Initial development*

The 2004/05 questionnaire was taken as the starting point for the 2007/08 development. Initial amendments (to reflect the changes above) were made and agreed with DIUS and WAG.

3.1.2 *Dress Rehearsal Piloting*

A ‘dress rehearsal’ pilot was carried out in October 2007, with the aim of testing the final version of the questionnaire and the fieldwork processes in preparation for the mainstage survey. The pilot was also the first opportunity to identify the length of the full interview.

Six institutions (4 English HEIs, 1 Welsh HEI and 1 FEC) were involved in the pilot. Students for the dress rehearsal pilot at the English institutions were selected from the pilot opt-in sample of institutions. In addition, one interviewer used snowball sampling to interview students at a Welsh HEI, in order to check questions specific to studying in Wales and the related routing within the questionnaire. (As all Welsh HEIs had been selected to take part in the main sample or as a reserve institution, it was not possible to use any of them at the pilot opt-in stage.)

In total, 44 interviews were conducted, with a good spread across respondent and course characteristics. (Interviewers were asked to attempt rough 'quotas' to achieve this.)

A number of amendments were suggested to the advance letter, instructions and briefing materials, and interviewer documents. Some amendments were also made to question wording or code frames, but only where this was judged not to have a major impact on trends. Many queries on the interview were addressed by the inclusion of additional interviewer instructions or noted as briefing points. It was noted that many students did not know or were confused by their student support arrangements. This occurred, for example, where parents or employers paid tuition fees directly. There was particular confusion over Student Loans for Fees as opposed to Maintenance, as well as evidence of double-counting of some types of support (e.g. Student Loans and tuition fee grants). To combat this, a number of strategies were used including clarifying the wording of some questions and the introduction of a showcard at the beginning of the fees section which outlined the types of grants or loans available.

The average interview length in the pilot was 54 minutes, longer than the target interview length (45 minutes). This was due to the inclusion of new questions related to the new fee support arrangements. Further questions were removed, namely:

- Follow-up questions on awareness and take-up of the Access to Learning and Financial Contingency Funds;
- Some of the questions relating to hardship (how respondents manage their money, items they may go without, past arrears).
- Distance between (parental) home and education institution.
- Some questions on access to computers and reasons for not owning one.

The final version of the questionnaire can be found in Appendix E.

3.2 Diary of spending

3.2.1 *Early development*

As with the questionnaire, the 2004/05 version of the diary was taken as the starting point of development. Based on the experiences in the last survey, two new categories of expenditure were added to the diary to collect specific information about parking costs for study-related and other reasons. Both paper and online versions were available for students to use, depending on their preferences.

Dress rehearsal pilot

The diary was tested as part of the overall dress rehearsal pilot in October 2007. Students who were interviewed in the pilot were asked to fill in a diary of spending for the seven days after the interview. Due to the short time period of the fieldwork, interviewers were asked to pick up the diaries where this was possible. Office staff then made reminder phone calls for any diaries that were due to be returned or completed after the fieldwork period had finished. The pilot was not therefore seen as a test of the diary return rate, as the mainstage procedures would fully involve the interviewer in the reminder and pick-up process and this strategy had been proven to maximise returns.

Of the 44 respondents who gave a pilot interview, around 18 also filled out paper diaries, while 3 filled the diary out online.

Completed diaries were inspected, in order to spot any potential problems in filling them out. No amendments were suggested for the diary, but a number of changes were made to the pick-up procedures and how interviewers were briefed about the diary.

3.3 Welsh language versions

A Welsh language version of the 2004/05 interview program was already available, so any amended questions for the 2007/08 survey were translated and added into the program. Full Welsh language showcards (to be seen by respondents) were also produced. This allowed the full interview to be carried out in Welsh by a Welsh speaking interviewer or an interviewer accompanied by a translator. A Welsh language version of the paper and web seven-day diaries of spending were also created and made available to interviewers in Wales.

After the Welsh translation of the CAPI questionnaire had been programmed alongside the English text, a Welsh speaking interviewer checked that the amendments made sense and matched the English version.

4 FIELDWORK

CAPI interviews covered all the students in the issued sample. This represented a change from the 2004/05 study when Open University (OU) students had been interviewed using computer assisted telephone interviewing (CATI) methods. However, it was felt that the cost and logistical benefits in interviewing this group separately were outweighed by the difficulties in comparing the resulting (fewer) data for OU students with the main sample of students and the complexities of programming more than one interview instrument.

4.1 Briefing and interviewer numbers

Around 210 interviewers were briefed over a two-week period from the 8th-17th January 2008, in half-day briefings. Five of these briefings were held in London, with the remaining briefings held in Cardiff, Brentwood, Bristol, Derby, Leeds and Manchester. An additional briefing was also held in Bristol on the 26th February. The briefings covered the background to the survey, the sample of respondents, use of the study documents (e.g. the advance letter, reminder letter and letter to vice chancellors), approaching the sample, an overview of the questionnaire content and showcards and use of the seven-day diary of spending.

4.2 Contact and interviewing procedures

4.2.1 Advance letter, address record form and showcards

Advance letters were sent to all sample members notifying them that they were about to be contacted by an interviewer from NatCen (see Appendix B). These letters were sent by the interviewers themselves to minimise the amount of time between the respondent receiving the letter and the interviewer calling at the address. For those students attending a Welsh institution, the advance letter was double sided in English and Welsh.

For each student issued in the main sample, interviewers were given an address record form (ARF) showing the contact details of the student including landline and mobile phone numbers where these were available. Interviewers also used the ARF to record details of their contact with the student. Interviewers were allowed to make contact by telephone if it was not possible to make initial contact face to face.

On contact with the student, the interviewer was able to ascertain if they required an interview in Welsh. For those who did, a Welsh language version of the programme and Welsh showcards were also available.

4.2.2 Contact and liaison with institutions

In December 2007, prior to the start of fieldwork, NatCen researchers wrote to the main contact person who had dealt with the sampling. The letter reminded them that student interviews would begin in January and asked them to pass the letter on to any relevant staff or contacts (see Appendix B). It also asked about any contact procedures NatCen

interviewers needed to follow if they came onto institutional premises (including halls of residence). A reminder e-mail was also sent shortly before fieldwork in January.

A number of institutions replied with additional contact procedures or contact names, and these details were circulated to all NatCen interviewers working on the project. Interviewers were also given a copy of the letter sent to institutions which they could produce when visiting university campuses, and were advised to register with the local police station whilst interviewing.

There were no reported problems with access to university or college premises during fieldwork.

4.2.3 Seven-day diary of spending

On completion of the CAPI interview, students were also asked to complete a diary of spending for the seven days following the interview. Interviewers were prompted at the end of the interview to brief the student on how to fill in the diary and were provided with a 'diary briefing card' giving basic instructions and an example to assist their explanation. A paper version of the diary was left with all students who agreed to fill it in. This also contained details of how to access and complete a diary online, using a unique ID number and password.

Several methods were applied to encourage students to fill in and return diaries, in order to maximise response rates for diary completion.

- **Reminder calls** — Interviewers were asked to contact students either face-to-face or by telephone two or three days after the interview with the aim of reminding students to fill in the diary (if not already underway) and answering any queries students might have. Reminder calls were made to students filling in either the paper or internet version of the diary.
- **Diary pick up** — Interviewers were asked to try to pick up the diary from the student to maximise the return of diaries. If the diary pick-up was not successful, interviewers were asked to leave a reminder letter and a reply pre-paid envelope to send the completed diary back to NatCen (Appendix B). For those students who planned to fill in the diary online, interviewers generally made a second telephone reminder call instead of a pick-up visit.

4.2.4 Incentives

On receipt of the completed diary by post or online the student received a thank you letter and £12 of Love2Shop vouchers (in addition to the £3 of vouchers received at the opt-in stage).

4.3 Fieldwork period and monitoring

Fieldwork began on 17th January 2008. Fieldwork was originally scheduled to end in the week commencing the 10th March.

Weekly response reports were issued to DIUS and WAG. There was one difficulty in monitoring returns, as the CAPI interview could only be transmitted back to the office once the interviewer had attempted at least one reminder call for a diary (as this information was

required for completion of the interview program). In fact, in most cases, the CAPI interview was only transmitted on completion and pick-up of a full diary, which took place around 10 days after the interview. The weekly response reports therefore had a built-in time lag, and the exact number of achieved interviews could not be determined.

However, by the middle of February, it was clear that the coverage of interviews was low, particularly in Wales. The initial sample for this area was large, but there had also been additional cases issued at the end of January for a number of Welsh institutions. To try to counter this low coverage, additional interviewers were briefed towards the end of February and cases reallocated to them. One other fieldwork area also briefed an additional interviewer for the study. Interviewers in other areas were reminded of the deadlines for the study, which reflected end of term dates when many students would leave their institutions.

The final cut-off for fieldwork was extended to the end of March 2008. Very few interviews were in fact conducted in these last few weeks. By the original end of fieldwork dates, 92% of the sample had been covered and 93% of all productive interviews had been returned.⁷

4.4 Response rates

4.4.1 Interview response

Table 4.1 shows the final response rates for the interview phase. Overall, 72% of the issued sample of students was interviewed. The original target for the 2007/08 study was 78% (based on the response rate achieved in 2004/05 of 78%, which had exceeded its target of 70%). The main reason why students did not take part was due to refusal (15%), followed by non-contact (5%). A further 5% of students were found to be ineligible when the interviewer contacted them or when their details were checked at the start of the interview (e.g. they had dropped out of their course).

Table 4.2 shows the response rates by type of institution and student. Response was highest for students at Welsh higher education institutions (HEIs), and lowest for those studying at further education colleges (FECs) or the OU. This was largely related to the rates of refusal amongst the different groups. Response was also lower for part-time students (and older students, more of whom tended to be part-time), mainly due to the higher rates of ineligibility amongst such students.

⁷ Note that these figures excluded interviews conducted but not yet returned, so a higher proportion of interviews might have been completed.

Table 4.1 Final productive and unproductive interview rates

	N	%
Issued	4,758	100
Covered	4,758	100
Productive:	3,432	72
Full interview	3,426	72
Partial interview	6	0
Unproductive:		
Refusal	697	15
Non-contact	240	5
Ineligible	219	5
Address problems	87	2
Other unproductive	83	2

Base: Students sampled and issued for interview for SIES 2007/08. The number issued differs slightly from that shown in Table 2.3 as a few cases were removed shortly after fieldwork started as they were ineligible or duplicate.

Table 4.2 Interview response rates, by institution and type of student

	Response rate (%)	Refusal rate (%)	Ineligibility rate (%)
All	72	15	5
English HEI	72	15	4
Welsh HEI	74	12	5
FEC	69	16	6
OU	62	20	7
Full-time	74	14	3
Part-time	67	16	10
Male	75	11	4
Female	71	16	5
Age at start of academic year:			
Under 20	75	14	2
20-24	72	15	3
25 or older	71	15	8

Base: Students sampled and issued for interview for SIES 2007/08.

4.4.2 Diary response

Table 4.3 shows the level of diary returns. In total, 86% of respondents who completed a full interview also returned a diary (close to the target of 88%). The majority of respondents

completed the paper version of the spending diary, although around a fifth of returns (20% of completed diaries) were online. The proportion of diaries completed online had risen since the 2004/05 study, when it was 13% of completed diaries.

Table 4.3 Final productive and unproductive diary rates

	N	% of (full) interviews	% of issued sample
Sample members issued	4,758	--	100
Achieved main interviews	3,432	100	72
Diary received	2,953	86	62
<i>Paper diary</i>	2,356	69	50
<i>Web diary</i>	597	17	13

Base: Students giving full interview and those sampled and issued for interview for SIES 2007/08. The number issued differs slightly from that shown in Table 2.3 as a few cases were removed shortly after fieldwork started as they were ineligible or duplicate.

The level of diary returns did not vary substantially for different groups (Table 4.4), although it was a little lower amongst FEC and OU students, and mature students (these groups would overlap). Younger and full-time students were more likely to complete the diary online.

Table 4.4 Diary return rates, by institution and type of student

	Diary return rate (% of full interviews)		
	All	Paper	Online
All	86	69	17
English HEI	88	70	17
Welsh HEI	84	65	19
FEC	82	69	14
OU	79	64	15
Full-time	87	68	19
Part-time	84	71	14
Male	84	71	14
Female	87	70	17
Age			
Under 20	89	69	20
21-24	86	67	19
25 or older	85	70	15

Base: Students giving full interview for SIES 2007/08. Age is based on information given in interview (rather than at opt-in stage), and excludes a small number of diaries removed after coding.

4.4.3 Interview length

The average length of the interview was 52 minutes. Interviews tended to be longer for part-time students (56 minutes compared to 51 minutes for full-time students), as they often had more income sources to report.

4.4.4 Fieldwork and quality control procedures

As with all surveys conducted by NatGen, a programme of back-checking on interviewer work was carried out. A subset (around 10%) of respondents were telephoned to check that the interviews were conducted correctly.

5 DATA CHECKING, CODING AND EDITING

5.1 Data checking

5.1.1 CAPI interview

Interviewers in the field carried out most of the validation of data for this study.

Interviewer checks in the questionnaire program allowed interviewers to clarify and query data discrepancies directly with the respondent. Generally, 'soft checks' (which could be suppressed by the interviewer) were used where unusually high values or inconsistent answers were reported, so that these could be checked before the answer was confirmed. It should be noted that this still allowed the original answers to be accepted, and interviewers were encouraged to record additional remarks if this was the case. Less often, 'hard checks' (which could not be suppressed by the interviewer) were used when an answer contradicted an answer earlier in the interview – the interviewer had to resolve such discrepancies before proceeding. Also within the program each numeric answer was given a set range of possible answers. This allowed only potentially valid answers. For example, if the maximum amount of course grant received by a part-time student is £250, this would be the upper limit of the range within a question asking about this.

Interim data were also inspected by researchers from NatCen and IES.

5.1.2 Diary of spending

Given that spending may legitimately be very high or very low in a given week, it was not feasible to set validation checks on individual entries in the spending diary. However, diaries were checked after receipt in the office for suspicious patterns of spending (see Section 5.2.2 below).

5.2 Coding and editing of data

5.2.1 CAPI interview

A data processing team carried out the coding and editing of computer assisted questionnaires. Coding data was necessary to enable the analysis of information collected by the interviewers typing in verbatim answers and to take into account any notes made by interviewers during the interview.

Factsheets were used to code and edit the data. These provided a summary of a productive interview and alerted editors to possible errors or inconsistencies that needed to be dealt with. A typical factsheet contained a listing of the respondent's details, key data items, open and 'other, specify' responses, and interviewer comments.

Code frames used in editing were developed by the researchers based primarily on those developed for the 2004/05 study. Where no previous list existed, researchers inspected question responses from the first completed interviews. Any complex editing decision was referred to the researchers for adjudication. These cases were documented and instructions relayed to the data processing team.

Coding and editing instructions for the CAPI interview can be found in Appendix C.

5.2.2 *Diary of spending*

A data processing team also carried out the coding and editing of the seven-day diaries of spending.

One purpose of the editing was to ensure that the diary had been completed for the seven different days of the week (so that a weekend or weekday was not over- or under-represented in the data). If the diary indicated that days of the week had been duplicated (e.g. Sunday missing, but two Tuesdays), the diary was not accepted. However, diaries were acceptable if there were entries for each different day of the week, even if the 7 days were not consecutive. In a small number of cases, diaries with other suspicious patterns⁸ of spending (e.g. duplicate entries for every day of the week) were also rejected.

The other major purpose of the diary editing was to allocate a code to any spending that students had entered as 'other' spending. The same rules that were developed for the 2004/05 study were adopted here. They were necessarily complicated because the aim of editing was for 'other' spending to be coded back into an existing category of spending within the diary, or, categorised by both a broad *type* of spending and whether this information had already been collected in the main interview. This categorisation was needed because the diary data and the interview data were looked at in combination in analysis. It was key that data about an item of spending was not double-counted by the interview and diary.

Coding and editing instructions for the diary of spending can be found in Appendix C.

5.3 Summary measures of income, expenditure, debt and savings

Within the main report the majority of monetary figures refer to the total amounts of money spent, received or owed over the whole academic year. However in the questionnaire and diary, these monetary amounts may have been recorded referring to a week, four weeks, a month, a term, a quarter, a vacation or over the whole academic year in order that students could give as accurate figures as possible. It was therefore necessary to create summary derived variables which totalled the amount of money spent or received over the full academic year, assuming that answers given in the questionnaire or diary represented average weeks.

The details of how all of these derived variables are created using the CAPI data are outlined in Appendix D. The derived variables relating to the day-to-day spending recorded in the diary follow the same principles. Again it was assumed that spending within the

⁸ It should be noted that blank days (i.e. with no spending) were acceptable, as was generally a blank week (i.e. no spending recorded at all for the week) as it was plausible that this could occur.

recorded week was an average week. The weekly amount spent on different types of item was therefore multiplied by 39 to give the spending for college- and university-based students over an academic year, whereas the money spent by Open University students was multiplied by 52 to give figures for their academic year.

6 DATA AND ANALYSIS

6.1 Dataset

Interview and diary data were merged together to form one complete dataset. This dataset also included all the derived variables for the interview and diary instruments.

6.2 Extreme values

Once the summary measures of income, spending, borrowing and savings were created and tested, they were reviewed by the research team. This allowed them to correct any unfeasible answers and also trim any outliers that would skew the analyses if left untreated. Trimming involved identifying outliers through boxplots and then trimming these outliers to the highest amount within the accepted range. In the questionnaire data around 115 high outliers were trimmed. In the diary data 133 high outliers were trimmed. (In some cases, inspection of the outliers revealed errors in how information had been entered, e.g. answers entered as pounds and pence, when only pounds were acceptable (thus multiplying the resulting figure by 100). These data were also corrected.)

6.3 Adjustments for joint income and expenditure

In the questionnaire and diary students were asked to give answers about their individual income and expenditure whenever this was feasible. However, for some items it was not feasible to record an individual amount when a student lived with a partner (for example, mortgage payments, social security benefits, and household spending on food and entertainment). Therefore, joint amounts were collected and these were adjusted in analysis.

The adjustment was made where students were married or had joint financial responsibility with a partner (defined as sharing responsibility for housing and other essential expenditure or having a joint bank or building society account). The method of adjustment was to divide the stated expenditure by half. A similar adjustment had been carried out in previous years of SIES.

Social security benefits and miscellaneous income from maintenance payments, rent from lodgers and sales of books and equipment were treated as joint income. Shared borrowings and savings were also treated as joint. Among items of expenditure, the items treated as joint expenditure were food and drink to consume at home, landline and mobile telephone costs, the costs of glasses, contact lenses, dental treatment, computer equipment, televisions and hi-fi equipment, furniture, household goods and appliances, holidays, and the costs of vehicles and their maintenance.

6.4 Additional data adjustments

A number of additional adjustments were made to the data, primarily in relation to the new questions asking about fees. It should be noted that adjustment was only made where it

was felt an error had been made and there was evidence from the data or additional information recorded by the interviewer that a change should be made. In cases where information was not consistent (e.g. total contributions to fees were more or less than the course fees) but there was no identifiable correction strategy, no adjustment was made. The main adjustments made were:

- 24 NHS students had not identified themselves as such in the introductory section, so were mistakenly asked the fees section. (In the dataset, the fees information has been removed and the question asking about whether or not they applied for tuition fee support (TUITAP) set to a new code 3 denoting support from the NHS.) Some of these students also recorded amounts under general student support questions that should have been recorded in specific questions on NHS support – the data were amended to reflect this.
- Some students had not included their Student Loan for Fees (FLOAN) in the amount recorded under their own contribution (DTFWHAM/ITFWHAM). This applied to around 350 cases. The amount of Student Loan was generally added on to any contribution made by themselves. In some cases, it had been recorded as an 'other' contribution so any amount recorded here was removed.
- A small number of old system and Welsh new system students recorded Student Loans for Fees that were higher than their course fees. For these cases, the course fees were amended to the higher amount.
- For a small number of Welsh new system students, there was sometimes confusion between the amounts given for the (fixed) tuition fee grant and the Student Loan. These were made consistent if it was felt amounts had been duplicated or switched; however, where this was not clear and the amount of the tuition fee grant was less than £1,845, no amendment was made.
- For around 40 students, changes were made to the fees section (e.g. amount of course fee, employer or other contributions) based on additional information recorded by the interviewer.
- For a small number of cases, additional information recorded by the interviewer indicated that different or higher amounts should have been recorded for certain types of student support, and the data were amended to reflect this. This applied mainly to course grants, training bursaries, Student Loans for Maintenance, Maintenance Grants and Higher Education Grants.

6.5 Data errors and imputation

Although interim data was inspected, a number of errors or other issues were detected with the data during checking and analysis. In general these affected different sub-groups of the sample, and are detailed below.

6.5.1 Open University students

It was found that some information for (the 92 interviewed) Open University (OU) students had not been correctly recorded. This applied to the job information (on which NS-SEC (National Statistics – Socio-Economic Classification) was based) and the income information. This information is therefore not available for such students.

6.5.2 Fee information and support for fees

It was found that some full-time old system students had missing information relating to how they paid their fees and what grants and Student Loan for Fees they had received (131 students in total). In the last study in 2004/05, such students were asked if their parents had to contribute to their fees (DTFAM or ITFAM). If they answered 'No', it was assumed that they got a full grant and no further questions about how they paid their fees were asked.

In 2007/08, the same question was asked of old system students. However, in addition, the interview also checked whether or not the student got a full grant (DTWTFG/DTWTFGA or ITWTFG/ITWTFGA). If the answers to the questions were inconsistent, the interviewer was alerted via a check. Whether or not the student was asked the remaining questions about fees was dependent on the first question (as per the last survey) rather than the specific questions about grants.

Despite the interview check, some students gave inconsistent answers, i.e. they said 'no' to the question about whether their parents had to contribute to fees, but also indicated no or a low grant for fees. They therefore were not asked questions about how they actually covered their fees, including the questions about Student Loans for Fees.

It looked likely that these students should have answered 'yes' to the first question about parental contribution, and been asked the remaining questions about fees. This was backed up by comparisons with 2004/05 data about the proportion of students receiving full grants (and figures from the Student Loans Company confirmed this had not changed over this period).

The missing information on parental/own/college (and other) contributions to fees as well as the questions relating to amount of Student Loan for Fees was therefore imputed for these cases, for the following reasons:

- excluding students from analysis implicitly assumes that they are fairly similar to the students who have responded. In this case, there was evidence that the missing group were more like students who did **not** receive full grants and were therefore more likely to use other means of paying for their fees e.g. by Student Loans. Excluding such students would be likely to undercount these other types of funding, and it was felt more desirable to adjust the data to some degree to correct for this potential bias.
- although the overall number of students with missing information would not have too large an effect on 'all sample' analysis, or analysis by other subgroups, it would affect comparisons between old and new system students within the 2007/08 wave, which were of interest to the study. (The missing information had only a very limited effect on trend comparisons between 2004/05 and 2007/08.)
- as missing information at the question level also affected derived variables, it also affected more general expenditure measures, and comparison measures based on income and expenditure.
- there was a large amount of background information available on each student which meant it was possible to impute fee information based on students with similar characteristics.

A hot-deck procedure was used to impute values of missing data. This works by matching a case with missing values to a similar case with full responses, on the basis of background

information. For this study, there was background information available on socio-demographics (e.g. sex, marital status) and their course/institution attended (year of study, subject of course).

Table 6.1 shows the variables used to divide the sample into groups of people sharing similar characteristics. The hot-deck procedure then used these classes. For example, a person in the first main class with missing values had these values replaced by those of someone from that main class with the same marital status, sex and degree-type (medical/not medical). The variables used to define the classes were chosen taking into account the type of analysis planned, the sample size available and the predictive power of the variable.

Table 6.1 Variables used to create imputation groups

Characteristics of the main class	Variables used to define the subclasses
1 Full-time, independent, English-domiciled	Medic, marital status, sex, course fee
2 Full-time, dependent, English-domiciled	Year of study, london, sex, course fee
3 Full-time, independent, Welsh-domiciled	Medic, marital status, sex, course fee
4 Full-time, dependent, Welsh-domiciled	Year of study, sex, course fee
5 Part-time teacher-trainers	No finer breakdown required (only 1 case required imputation)

The imputed variables therefore corrected for non-response bias in calculating means and proportions of national population estimates and estimates of most major subgroups. Hot-decking, like many other imputation methods can introduce bias in estimates of standard deviations and other secondary statistics. Although this can be a problem, it is unlikely to be a big problem unless a high proportion of respondents have imputed values. Because of this any subgroup analysis using the imputed variables should be checked by counting the number of imputed cases used. However, checks comparing the original dataset with data including imputed variables indicated that there were no strong effects on computed means.

In the dataset, imputed cases can be identified by the condition DVFLAG1>0. All summary derived variables include the imputed information but question-level variables have not been altered. Additional variables were added which contain the imputed question-level data.

6.5.3 Maintenance Grant

English-domiciled students studying in Wales (N=78) were not asked the specific prompt question asking about receipt of Maintenance Grants. In the main report, figures for receipt of this funding stream are based on English-domiciled students studying in England only. If it is assumed that a similar proportion of students in Wales would have received the Maintenance Grant⁹ as in England, the proportion of English-domiciled students receiving it overall would rise to 43% (compared to 41% based on those studying in England only). This should also make very little difference to the total average income figure as it only affects a

⁹ In fact, figures from the higher education awards data indicate that the proportion of students receiving Maintenance Grants is lower for those studying in Wales compared to those studying in England.

relatively small number of students and Maintenance Grant income could also have been recorded under the general 'other' category of student support.

6.5.4 Financial status and NS-SEC

During analysis, it was also noted that the proportion of independent students was higher than that found in 2004/05 and compared to information available from the Student Loans Company. This increase was mainly attributable to a change in how these students were classified in the questionnaire. The previous method of classifying students was no longer viable as it was linked to the old system of student financial support.

In 2007/08, students were classified as independent if they were (a) part-time or (b) full-time and in one of the following groups: aged 25 or over, married, living with dependent children or had supported themselves financially for three years or more prior to their course (based on a new question SUPFIN). However, some students seem to have misinterpreted this question.

It was therefore agreed to recode student status from independent to dependent, where:

- students were **only** classified as independent because they reported they had supported themselves financially for three years or more at SUPFIN
- and**
- where they also reported that their parents', step-parents', or guardians' income was taken into account when assessing support (at the question LEASS1).

The status recode applied to 158 English-domiciled students and 46 Welsh-domiciled students.

NS-SEC is also linked with student status because it relies on information about parental or own occupation. In the survey, dependent students were asked about their parents' (or equivalent) occupation whereas students classified as independent were asked about their own. Therefore, the recoding of status also had an impact on NS-SEC. In effect, students who were re-coded from independent to dependent now have a missing NS-SEC (because they were not asked about their parents' occupation).

Among Welsh-domiciled students, the recoded students were no different to the rest of the Welsh dependent students by gender, age and ethnicity. However, for English-domiciled students there were some significant differences:

- newly recoded students average income was lower, with less coming from the main sources of support and their family, but more from work
- recoded students were more likely to be aged 20-24 at the start of the academic year, BME, and their parents were less likely to have gone to university.

6.6 Weighting¹⁰

6.6.1 Summary of approach

The SIES weights were calculated from the estimated probability of being both selected and responding to the survey. For the survey this overall probability was calculated as the product of three main components:

- probability that the institution/student was selected (described in Section 6.6.2);
- probability of agreeing to be followed-up by interviewer (Section 6.6.4);
- probability of taking part in the main interview (Section 6.6.5).

The weights were calculated as the *inverse* of the overall probability. Extreme weights were trimmed so as to reduce their impact (detailed in Section 6.6.3). Finally, the weights were adjusted so that the characteristics of the weighted sample matched that of the student population (as recorded by HESA) in terms of age and sex (described in Section 6.6.6).

The overall aim was to generate a weighted sample that matched the population of students¹¹ as closely as possible, whilst at the same time generating weights that were not so variable that the standard errors of survey estimates were unnecessarily inflated.

6.6.2 Computing the probability that the institution/student was selected

Section 2.2.3 gives full details of how institutions and students within institutions were selected, and the resulting selection probabilities.

Dealing with non-response by institutions

In principle the selection probabilities for the institutions in the survey were simply calculated as set out above. However not all selected institutions agreed to take part, and we adopted a policy of replacing any that refused with other ‘similar’ institutions. This means that the final sample of institutions is not, as was intended, a strict probability sample. Nevertheless we have treated the sample as a probability sample when calculating the weights, with ‘replacement’ institutions being assumed to have been selected with probability equal to their calculated probability of selection prior to replacement.

Even with replacement, four ‘co-operating’ institutions did not mail out to students. This potentially gives a small non-response bias to the survey, but given that the response rate by institutions was very high we have not adjusted the weights to account for this loss. In part the final adjustment stage of the weights (see section 5) is an attempt to deal with any bias this non-response introduces.

¹⁰ Please note that throughout the section on weighting, part-time students studying for PGCE/ITT are treated as part-time students, following the sampling definitions. However, in interview and during analysis for the main report, these part-time students were treated as full-time students, reflecting the similarity in their student support arrangements.

¹¹ To recap, the eligibility definition for the survey specified that students had to be English- or Welsh-domiciled; studying at an English or Welsh HEI or FEC, or the OU; studying for a higher education qualification (namely a first degree, foundation degree, PGCE/ITT, Dip HE, HND, HNC, Certificate of Higher Education, or University Certificate or Diploma) and studying full-time or if part-time for 50% or more of the full-time equivalent course.

Probability of selection for students within institutions

Section 2.2.3 describes how we specified the number of students to select per institution. For instance, in Queen Mary and Westfield we specified that 245 English-domiciled full-time students were to be selected. From HESA we assumed that they would select these 245 from a population of around 6,905 English-domiciled full-time students, giving a sampling probability of 0.035. In practice we knew that the HESA figure of 6,905 would not be exact, so the actual probability would be higher or lower than 0.035.

For each institution selected who took part in the survey we asked for information to be returned on the number of students per group that were selected *and* the size of the population groups from which the samples were selected. This information allowed us to calculate the actual selection probabilities.

However not all institutions provided us with the population counts: for those that did not we have assumed that the actual number of students within an institution equals their HESA count.

In some institutions there was quite a marked difference between the HESA count and the population that institutions told us they had drawn their sample from.¹² We have taken the numbers provided by the institutions as correct. But the result is that the selection probabilities, and hence the survey weights, vary more than we might have hoped for across institutions. Below we explain how we have dealt with this.

6.6.3 Trimming the extreme selection weights

As noted above, the selection weights calculated for the survey (within categories defined by sector and mode of study) were very variable. Given that variance in weights tends to inflate standard errors of estimates, it is standard practice to trim the weights at the extreme tails of the distribution to reduce the variance, even at the risk of introducing a small bias.

The trimming was carried out as follows:

1. We listed the institutions in order of the selection weights for the following 9 subgroups (note that the same selection weight applies to all individuals within the same subgroup in the same organization so ordering weights by institutions is possible):

English higher education institutions (HEIs), Medics
English HEIs, full-time English-domiciled
English HEIs, full-time Welsh-domiciled
English HEIs, part-time
Welsh HEIs, full-time English-domiciled
Welsh HEIs, full-time Welsh-domiciled
Welsh HEIs, part-time
Further education colleges (FECs), full-time
FECs, part-time

¹² This may be due to the different stages of the academic year at which the SIES and HESA counts were made. Also, franchised students may not be counted in the same way.

2. Within each group we trimmed the selection weights for those institutions with either extremely large or extremely small values.

However this approach does not entirely eliminate the problem of extreme weights. One of the differences between the 2004/05 and 2007/08 surveys is that in 2007/08 we knew exactly which group a student had been selected from, whereas in 2004/05 we did not. For example, if in 2004/05 a student self-reported in their postal questionnaire that they were full-time we simply assumed that they were selected by their institution as part of the full-time sample. In 2007/08 we were able to test this assumption and found that a small number of students gave a self-report different to that of the institution.

The consequence of this change is that in 2007/08 the students with a mismatch had selection weights very different to other students who self-reported as they did. For instance, in QMW, English-domiciled full-time students were selected with probability 0.033 whereas part-time students were selected with probability 0.27. Students selected as full-time but self-reporting as part-time would be given a weight of $1/0.033$ which is very different to the weight of $1/0.27$ given to other self-reporting part-time students.

To deal with this the following strategy was adopted: any student with a self-report different to their sample group was given the selection weight equal to their self-reporting equivalents. Again, this may introduce a small bias but the benefits in terms of decreased variance in the weights were felt to compensate for this. The number of students affected is shown in Table 6.2.

Table 6.2: Number of students moving from their original sampling group

	Final group:			
	Medics	Eng Dom FT	Wel Dom FT	PT
Original sample group:				
Medics	-	0	0	0
Eng Dom FT	0	-	10	13
Wel Dom FT	0	12	-	3
PT	0	49	10	-

6.6.4 Modelling the probability of agreeing to be followed up by interviews

Having calculated and trimmed the selection weights the next stages for the weighting were adjustments for non-response. This comprised the following three stages:

- adjustment for refusal to be followed-up by an interviewer (conditional on returning a postal questionnaire and being eligible for follow-up)
- adjustment for non-response to the survey (conditional on agreeing to follow-up)
- a final adjustment of the survey to the HESA age-sex distribution.

This section describes the first of these.

The probability of agreeing to be followed-up by an interviewer was estimated using a non-response model. The approach adopted was to use a logistic regression model to predict a binary variable defined as:

1 = eligible for re-contact and agree to re-contact

0 = eligible for re-contact but do not agree to re-contact.

The predictors of this variable entered into the model were (using the question numbers from the opt-in questionnaire)¹³:

- Q1 - payment of tuition fees
- Q2 - how well manages financially
- Q3 - applications for access/hardship funds
- Q4 - sex
- Q7 - highest qualification before course
- Q8 - whether parents went to university
- Q10 - whether full-time or part-time course
- Age (derived from date of birth)
- Sector - English HEI, English FEC, OU or Welsh HEI

Variables were entered forward stepwise into the model so as to avoid generating an overly complex model that would lead to more variability in the non-response weights. Six variables were found to be significant: Q1, Q2, Q3, Q4, Q10 and Age. The model coefficients are given in Table 6.3.

¹³ The full list of variables tested were Qs 1-5, 7-8, 10, whether part of medical boost and type/location of institution. See Appendix B for a copy of the opt-in questionnaire.

Table 6.3: Non-response model for agreement to be followed up by interviewer

	Coefficient	Standard error
Q1: How pay tuition fees		
Paid full tuition fees	(baseline)	
Paid contribution to tuition fees	-0.195	0.132
Paid no tuition fees	-0.260	0.082
Don't know	-0.413	0.196
Q2: How well manage financially		
Manage very well	(baseline)	
Manage quite well	0.205	0.119
Get by	0.259	0.119
Some financial difficulties	0.611	0.144
Lots of financial difficulties	0.942	0.216
Q3: Applied for access/hardship funds		
Yes – have applied	(baseline)	
Yes – expect to apply	0.545	0.242
Don't know/Not sure	0.201	0.161
No	-0.254	0.143
Q4: Gender		
Male	(baseline)	
Female	0.193	0.078
Q10: Mode of study		
Full-time	(baseline)	
Part-time	-0.168	0.098
Age		
19 or younger	(baseline)	
20 to 25	-0.077	0.103
26 to 29	-0.142	0.172
30 to 39	-0.162	0.143
40 or older	-0.382	0.135
Constant	1.587	0.192

6.6.5 Modelling the probability of taking part in the main interview

For those agreeing to follow-up, the probability of agreeing to take part in the main interview was also estimated using a logistic regression model, the predictors in the model being the same list as used in the model to predict consent to follow-up (see previous footnote for a full list of variables). The binary dependent variable in this case was 1 for a productive interview.

Four variables were found to be significant: Q2, Q4 Q10 and Age. The model coefficients are shown on Table 6.4.

Table 6.4: Non-response model for taking part in the main interview

	Coefficient	Standard error
Q2: How well manage financially		
Manage very well	(baseline)	
Manage quite well	0.311	0.126
Get by	0.120	0.121
Some financial difficulties	-0.061	0.129
Lots of financial difficulties	0.142	0.164
Q4: Gender		
Male	(baseline)	
Female	-0.182	0.074
Q10: Mode of study		
Full-time	(baseline)	
Part-time	-0.435	0.089
Age		
19 or younger	(baseline)	
20 to 25	-0.059	0.087
26 to 29	0.004	0.148
30 to 39	0.063	0.124
40 or older	0.281	0.126
Constant	1.054	0.132

6.6.6 Post-stratification to HESA totals

Applying the selection weights multiplied by the non-response weights described above does not appear to give a final weighted dataset that is genuinely representative of the student population – in the sense that the survey does not match HESA statistics particularly well. This survey bias probably arises because most of the non-response to the survey arises at the first stage: that is, non-response to the postal survey. Biases introduced at this stage are not adjusted for in the non-response models described in the previous two sections.

To reduce the bias, we included a final adjustment to the weights to bring the survey into line with HESA. This final stage adjusted the existing weights (the previous components of weighting described above multiplied together) to HESA counts by age and sex within each of the following 9 groups:

1. English HEI, English-domiciled full-time
2. English HEI, Welsh-domiciled full-time
3. English HEI, English- & Welsh-domiciled part-time
4. Welsh HEI, English-domiciled full-time
5. Welsh HEI, Welsh-domiciled full-time
6. Welsh HEI, English- & Welsh-domiciled part-time
7. FEC, full-time
8. FEC, part-time
9. OU

The population figures used for the calibration adjustment are shown in Table 6.5.

Table 6.5: HESA 2006/07 population estimates

	HESA Population estimate			
	Age		Gender	
	<= 25	26+	Female	Male
English HEI, English-domiciled FT	736,165	122,000	486,500	371,665
English HEI, Welsh-domiciled FT	17,065	815	9,855	8,025
English HEI, English- & Welsh-domiciled PT	35,950	88,770	74,705	50,015
Welsh HEI, English-domiciled FT	25,290	1,345	13,655	12,980
Welsh HEI, Welsh-domiciled FT	27,285	6,875	20,600	13,560
Welsh HEI, English & Welsh-domiciled PT	2,320	6,660	5,155	3,825
FEC, FT	18,480	9,515	15,285	12,710
FEC, PT	13,890	21,360	17,955	17,295
OU	4,254	24,154	20,048	8,360

6.6.7 Distribution of the final weights

Table 6.6 gives the distribution of the final trimmed and calibrated weights.

Table 6.6 Distribution of weights by sector and mode of study

	English HEIs	English FECs	OU	Welsh HEIs	Total
Full-time					
Mean	1.41	0.45	-	0.36	1.13
Median	1.31	0.41	-	0.28	1.17
Std. Deviation	0.61	0.20	-	0.26	0.70
Minimum	0.09	0.15	-	0.10	0.09
Maximum	3.46	0.89	-	1.91	3.46
5 th percentile	0.29	0.20	-	0.13	0.17
95 th percentile	2.52	0.84	-	0.76	2.44
Part-time					
Mean	0.79	1.08	0.91	0.10	0.64
Median	0.63	1.03	0.89	0.09	0.48
Std. Deviation	0.58	0.69	0.36	0.07	0.60
Minimum	0.13	0.26	0.44	0.04	0.04
Maximum	3.25	3.55	1.83	0.45	3.55
5 th percentile	0.16	0.36	0.49	0.04	0.05
95 th percentile	1.96	2.40	1.69	0.21	1.80

6.6.8 The effect of the weights on effective sample size for key groups

The effective sample size of a given weighted base is the equivalent simple random sample size which would have the same statistical power. It is calculated as the squared sum of all weights (summed over all cases in the sample) divided by the sum of all squared weights.

Tables 6.7 and 6.8 present the effective sample sizes for full-time and part-time students for each sector and overall, followed by figures by domicile. Note that the greatest losses of effective sample size, in percentage terms, occur for Welsh HEIs (where it is primarily caused by the over-sampling of Welsh-domiciled students relative to English and because most Welsh HEIs were selected with certainty and the sample size per Welsh HEI was not set proportional to the population size¹⁴) and part-time students (where, as in 2004/5 the probabilities of selection of students within institutions proved hard to control because the HESA counts were only moderately correlated with the population counts that institutions drew their samples from).

¹⁴ The sample size per HEI was set equal so that the burden of the survey was distributed equally across institutions. This is not statistically 'optimal' for Welsh HEIs.

Table 6.7 Effective sample sizes by sector and mode of study

	English HEIs	English FECs	OU	Welsh HEIs	Total
Full-time					
Sample size	1,839	182		499	2,520
Effective sample size	1,546	153		326	1,816
Effective as % of actual	84%	84%	-	65%	72%
Part-time					
Sample size	467	96	92	255	818
Effective sample size	301	69	80	178	406
Effective as % of actual	64%	72%	87%	70%	50%

Table 6.8 Effective sample sizes by domicile

	English-domiciled	Welsh-domiciled
Full-time		
Sample size	2,005	513
Effective sample size	1,647	383
Effective as % of actual	82%	75%
Part-time		
Sample size	590	228
Effective sample size	368	140
Effective as % of actual	62%	61%

6.6.9 Diary weights

In 2004/05, separate weights for the diary analysis (which took account of non-completers) were considered but discounted due to the high diary return rate and considerable complications of analysis that separate weights would introduce. The same situation applied in 2007/08, with a similarly high diary return rate. A comparison of the profiles of students being interviewed and completing a diary also showed no obvious differences. It was therefore agreed with DIUS/WAG not to have separate diary weights.

6.7 Identifying old and new system students

The tuition fee and student support system underwent great change between the 2004/05 and 2007/08 surveys, primarily with the introduction of variable tuition fees and Student Loans for Fees. Broadly speaking, these changes affected students starting their courses in England in September 2006 and after (although there were a number of exceptions to this e.g. students applying in 2005/06 but deferring their courses to September 2006, and students in Wales who were subject to variable fees a year later). The sample for the study therefore included students under both the 'old' and 'new' fee arrangements. Students subject to the arrangements prior to the main reforms and paying fixed tuition fees of £1,225 (full-time) for the year were 'old' system students. Students paying variable tuition fees (up to £3,070 for the year) were 'new' system students. It should be noted though that 'old'

system students could also access some of the 'new' system support (principally Student Loans for Fees).

In order to class students under the appropriate system for the survey, the following procedures were used:

- Students were asked which academic year they started their course;
- Those starting in 2006/07 were asked if they had deferred their course;
- The program then derived an old/new system indicator based on responses to these questions (those starting before 2006 or taking up a deferred place in 2006 were classed as 'old'; all others were classed as 'new');
- The interviewer then checked back with the students to see if they agreed with this classification. Definitions of old/new systems were provided for the interviewer to read out if necessary.
- If a student disagreed with the program derivation, the interviewer would change it as necessary. Students who agreed or did not know stayed as classified by the computer.

It is difficult to give an absolute assessment of the reliability of this self-classification. However, it should be noted that only a small proportion of students (6% overall) disagreed with the computer-derived classification based on when they had started their course. Of these, most said they did not know whether they were old or new system students (rather than stated that the computer-derived classification was wrong). Part-time students (who were less affected by the reforms) were more likely to say they did not know which system they were under. Interestingly, students starting their courses in 2006 (whether deferred or not) were most likely to change the classification assigned to them, implying that they were more aware of what system they were under.

6.8 Conducting analysis

In conducting analysis of SIES data for the main report, all percentages and means quoted are based on weighted data. The unweighted number of cases on which figures are based is also included. All regression analyses were also carried out on weighted data.

Thirty was taken as the minimum subgroup size for which percentages and means could be quoted. Figures based on subgroup sizes of less than 50 are shown in brackets.

In the regression analysis, 30 was again taken as the minimum subgroup size that would be included in the analysis. If a category was smaller than this, it was either:

- a) merged with another category where this was meaningful to do so (and where it resulted in a larger subgroup with 30 or more respondents).
- b) excluded from the analysis, if no options for collapsing categories were available.

All cross-tabulation, description of means, regression analysis and significance testing for the main report was carried out using SPSS. Commands from the Complex Samples procedures were used, to ensure the correct treatment of complex sampling weights in these procedures.

7 FUTURE LESSONS

In conducting the 2007/08 wave of the Student Income and Expenditure Survey, the following issues have emerged as important in carrying out any future waves of this study:

- Generating the sample of students. The methodology used to identify students in the 2007/08 was the same as that used in the 2004/05 study, namely recruiting a sample of institutions and using opt-in procedures to identify students. However, using an opt-in procedure is not ideal in terms of maximising coverage and the opt-in rate has dropped since 2004/05, and for any future waves the methodology should be carefully reviewed to ensure it is still feasible. A more radical alternative would be to explore scenarios allowing an *opt-out* approach. This would require negotiations between the institutional sector and DIUS/WAG to set up procedures (at enrolment) where students could give their consent to be contacted by the survey contractors. (This is the approach used for the National Student Satisfaction Survey.) Such procedures would need to be in place some time before the next wave of the study was due to start.
- After the opt-in, the response rate among students was good and completion of the diary also remained high, giving a high level of correspondence between the samples used for income and expenditure analyses. This makes the combination of interview and diary information a viable data collection option for future surveys.
- Trend measurement and therefore retaining the consistency of measures between studies will remain important. However, a number of questions - particularly in relation to the payment of fees – required additional editing or imputation (see Sections 6.4 and 6.5). The questions concerned along with their routing should be reviewed in order to avoid imputation procedures and minimise any additional editing. The questions for Open University (OU) students also need review and correction. The procedures used for determining whether students are dependent or independent also need attention.
- Response among part-time and OU students was lower than for full-time students. One strategy may be to place more emphasis on the full range of students eligible for the study in the covering letters at the opt-in and interview stages, e.g. by including a sentence “We’re interested in the experiences of all types of students, including full- and part-time students, those at the Open University and distance learners” or by developing special letters for each group.
- It may also be useful to carry out some review of certain key measures or approaches taken in the study to measuring students’ income and expenditure. Some possible areas for review could include exploring in detail how students estimate future income or outgoings, identify student support and their own financial status (e.g. through cognitive interviewing), or whether some kind of online calculator may be useful for interviewers.
- Weighting schemes are likely to continue to have a major impact on the study results, and it would be useful to explore further the reasons for the discrepancy between

HESA and study counts of students. Consideration should be given to the use of HESA counts as at 1 December instead of end of year counts¹⁵, since one hypothesis for the reason for differences between the survey and HESA weighting targets is that the respective figures relate to different points of time in the academic year.

¹⁵It should be noted that (as for the 2004/05 study) only HESA data relating to the previous academic year (i.e. 2006/07) were available at the time of constructing the weights for the 2007/08 survey.

APPENDIX A LIST OF INSTITUTIONS INVOLVED

HEIs in England (including Open University)	HEIs in Wales	FECs in England
Anglia Ruskin University	University of Hull	Cardiff University
Bournemouth University	University of Leeds	Swansea Institute of Higher Education
Canterbury Christ Church University	University of Leicester	The North-East Wales Institute of Higher Education
De Montfort University	University of Liverpool	University of Wales, Newport
Goldsmiths College	University of Manchester	Trinity College, Carmarthen
Kings College	University of Northampton	University of Glamorgan
Leeds Metropolitan University	University of Northumbria at Newcastle	University of Wales Institute, Cardiff
Middlesex University	University of Nottingham	University of Wales, Aberystwyth
Newman College of Higher Education	University of Oxford	University of Wales, Bangor
Open University	University of Plymouth	University of Wales, Swansea
Oxford Brookes University	University of Reading	
Queen Mary and Westfield College	University of Salford	
Royal Holloway and Bedford New College	University of Sheffield	
Sheffield Hallam University	University of Sunderland	
Staffordshire University	University of Teesside	
The Manchester Metropolitan University	University of Warwick	
The Nottingham Trent University	University of Westminster	
University of Bath	University of	
University of Birmingham	Wolverhampton	
University of Brighton	University of Central England in Birmingham (now renamed Birmingham City University)	
University of Bristol	University of Chester	
University of Cambridge	University of Derby	
University of Central Lancashire	University of Durham	
University of Chichester	University of Hertfordshire	
University of Greenwich	University of the Arts, London	
	University of the West of England, Bristol	
	York St John University College	
		Bedford College
		Blackburn College
		City College Plymouth
		College of North West London
		Doncaster College
		Gateshead College
		Havering College of Further and Higher Education
		Herefordshire College of Art
		Lincoln College
		Macclesfield College
		Matthew Boulton College of Further Education
		Newcastle College
		North Devon College
		Sheffield College
		South College Nottingham
		Sparsholt College Hampshire
		Warwickshire College
		Wigan and Leigh College
		Worcester College of Technology

APPENDIX B MAINSTAGE FIELDWORK DOCUMENTS

The following documents appear in this appendix:

- Initial letter to institutions inviting them to take part (HEI version)
- Initial letter to institutions inviting them to take part (FEC version)
- Opt-in invitation letter
- Opt-in form
- Opt-in reminder letter
- Pre-fieldwork letter to institutions
- Advance letter to respondents
- Reminder letter to respondents
- Thank you letter to respondents

There were several variations of these documents and only the main examples are included here. Letters and forms to Welsh institutions, or students studying at Welsh institutions were also translated into Welsh. Institutional letters were also customised for the Open University.

24 May, 2007



ies

Name
Position
Institution
Address
Address
Address

Dear

Student Income and Expenditure Survey (SIES) 2007/8

I am writing to alert you to the 2007/8 Student Income and Expenditure Survey and to seek your co-operation if you are asked to participate.

The Department has undertaken surveys of students' finances whilst in Higher Education – known as the Student Income and Expenditure Survey (SIES) – at regular intervals since the 1980s. The SIES provides a comprehensive assessment of income, expenditure, debt, savings and financial hardship and is used as an evidence base for designing student support policy.

The 2004/05 SIES was undertaken by a research team from the National Centre for Social Research (NatCen) and the Institute for Employment Studies (IES) and provides a baseline against which to monitor changes following the 2004 Higher Education Act. We are very grateful to all those institutions who provided their support and to the students who participated. A summary of the key findings are enclosed with this letter for your interest, and the full report can be downloaded from the DfES research website by typing the reference number 2002179 in the search box:

<http://www.dfes.gov.uk/research/>

The 2007/8 SIES will continue to provide an accurate picture of students' finances and standards of living whilst studying. It will enable the impact of the introduction of deferred variable fees and student support arrangements to be measured, and will provide important evidence for the 2009 Independent Commission on student finance.

The Department has again awarded the contract for the 2007/8 SIES to the consortium from NatCen and IES. Researchers from IES will be contacting selected institutions over the next few weeks to discuss participation and will be able to answer more detailed questions about the research at that point.

It would be most helpful if you could nominate a member of staff with whom the researchers could deal, should your institution be selected. We also hope you would be able to convey to them the crucial importance of this work for national policy and for the future of Higher Education. The effort required of your staff will be modest, fully supported by the research team and will comply with data protection legislation.

Fieldwork is scheduled for Spring term in 2008, and the full results of the study will be published in early 2009. If you have any concerns or queries about the study, please contact Emma Pollard at IES on 01273 873605. Alternatively, you can speak to my officials at the number below.

Yours sincerely

A handwritten signature in cursive script that reads "Bill Rammell".

BILL RAMMELL MP

Minister of State for Higher Education
and Lifelong Learning

Contact number for any enquiries

Matthew Bollington
0207 925 6222

24 May, 2007



ies

Name
Position
Institution
Address
Address
Address

Dear

Student Income and Expenditure Survey (SIES) 2007/8

I am writing to alert you to the 2007/8 Student Income and Expenditure Survey.

The Department has undertaken surveys of students' finances whilst studying Higher Education courses in both Higher Education Institutions and Further Education Colleges with Higher Education students, – known as the Student Income and Expenditure Survey (SIES) – at regular intervals since the 1980s. The SIES provides a comprehensive assessment of income, expenditure, debt, savings and financial hardship and is used as an evidence base for designing student support policy.

The 2004/05 SIES was undertaken by a research team from the National Centre for Social Research (NatCen) and the Institute for Employment Studies (IES) and provides a baseline against which to monitor changes following the 2004 Higher Education Act. We are very grateful to all those institutions who provided their support and to the students who participated. A summary of the key findings are enclosed with this letter for your interest, and the full report can be downloaded from the DfES research website by typing the reference number 2002179 in the search box:

<http://www.dfes.gov.uk/research/>

The 2007/8 SIES will continue to provide an accurate picture of students' finances and standards of living whilst studying. It will enable the introduction of deferred variable fees and student support arrangements to be measured and will provide important evidence for the 2009 Independent Commission on student finance.

The Department has again awarded the contract for the 2007/8 SIES to the consortium from NatCen and IES. Researchers from IES will be contacting you shortly to discuss participation and what this would involve, and will be able to answer more detailed questions about the research at that point.

It would be most helpful if you could nominate a member of staff with whom the researchers could deal. We also hope you would be able to convey to them the crucial importance of this work for national policy and for the future of Further Education. The effort required of your staff would be modest, would be fully supported by the research team and will comply with data protection legislation.

Fieldwork is scheduled for Spring term in 2008, and the full results of the study will be published in early 2009. If you have any concerns or queries about the study, please contact Emma Pollard at IES on 01273 873605. Alternatively, you can speak to my officials at the number below.

Yours sincerely

A handwritten signature in black ink that reads "Bill Rammell". The signature is written in a cursive style with a period at the end.

BILL RAMMELL MP

Minister of State for Higher Education
and Lifelong Learning

Contact number for any enquiries

Matthew Bollington
0207 925 6222

Autumn 2007

Ref: **Student Income and Expenditure Survey 2007/08**

Dear Student

How are you coping with your finances whilst studying? What do you think about your funding and support arrangements? Are you concerned about debt levels when you finish? Now is your chance to pass on your views and experiences to the Government – to make a difference!

The Department for Innovation, Universities and Science (DIUS) and the Welsh Assembly Government (WAG) have asked the Institute for Employment Studies (IES) and the National Centre for Social Research (NatCen) to undertake a nationwide study of students' income and expenditure. This will enable the DIUS and WAG to monitor the impact of changes in funding arrangements and the **real financial issues facing students** in England and Wales.

This work is supported by your university, university college or further education institution. They have randomly selected you to participate in this important research, and have forwarded this letter to you on our behalf.

As a first step, we are asking you to fill out and return the enclosed form and give permission for us to contact you for the main study. It is vital to the study's success that as many students as possible do this. Filling in this form should take no more than **five minutes of your time** and there is a pre-paid envelope in which to return it. As a gesture of thanks for your co-operation a £3 Love2Shop voucher is enclosed.

The next stage, early in 2008, involves an interview and keeping a track of your spending for a week. If you help us with this, you will be given an additional £12 worth of vouchers to thank you for your time.

All of the information you provide will be treated in the strictest confidence in accordance with the Data Protection Act, and nothing that could be used to identify you will be passed on to anyone outside IES or NatCen.

Please return the form in the pre-paid envelope as soon as possible. However, should you have any queries please do not hesitate to contact Emma Pollard on 01273 873605 or Claire Johnson on 01273 877607.

Many thanks for your help with the study.

Yours sincerely



Nigel Meager
Director, The Institute for Employment Studies

Department for
**Innovation,
Universities &
Skills**



Llywodraeth Cymru
Welsh Assembly Government



ies
institute for
employment
studies



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Registered office as above
Registered in England
no. 931547

IES is a charitable company
limited by guarantee.
Registered charity no. 258390

Autumn 2007

Ref: **Student Income and Expenditure Survey 2007/08**

Dear Student

We recently sent you a letter about the Student Income and Expenditure Survey 2007/08 asking you to complete a short questionnaire and provide contact details to enable you to participate in this important survey. **If you have recently returned the questionnaire, please ignore this letter and we apologise for contacting you again.**

However, if you have not yet had time to complete the questionnaire, or did not receive the original, we would be very grateful if you could spare just **five minutes** to complete the enclosed copy, adding your contact details, and return it in the pre-paid envelope **as soon as possible**.

Most importantly it is essential that as many students as possible agree to be contacted to take part in the interview for this important national research which will inform the Government about real financial issues facing students in Higher Education in England and Wales. We want to ensure that as many students from a variety of institutions and backgrounds are able to share their experiences, so **your reply and participation are important**. Please complete and return the enclosed form, giving your contact details, so that we can get in touch with you about the next stage of the research.

Further participation would involve an interview and keeping a track of your spending patterns for one week. If you take part in this stage of the research you will be given **an additional £12 worth of vouchers** to thank you for your time.

Thank you once again and best wishes for your studies.

Yours sincerely



Nigel Meager
Director, The Institute for Employment Studies

Department for
**Innovation,
Universities &
Skills**



Llywodraeth Cymru
Welsh Assembly Government



ies
institute for
employment
studies



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no. 931547

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Lastly and most importantly

Data Protection Act 1998: The information you provide will be processed by IES and NatCen, on behalf of the Department for Innovation, Universities and Skills/Welsh Assembly Government, only for the purpose of administering the Student income and Expenditure Survey 2007/08, in compliance with their duties and obligations under the Act.

Contact Details:

If you are willing to take part in the main study, please complete the contact details below.

Title (Mrs/Mr/Ms/Miss): First name: 281-284
285-317

Last name: 318-347

Mobile phone number: 348-362

Term-time Address:

363-402

403-442

443-482

483-522

523-552

Postcode: 553-560

Home Address (if different from term-time):

561-600

601-640

641-680

681-720

721-750

Postcode: 751-758

Term-time phone number (including area code): 760-771

Home phone number (if different, including area code): 772-783

Email address (Please print clearly):

784-823

If you are interviewed and complete an expenditure diary, you will receive a further £12 of vouchers as a thank you.

Thank you for your help

Please return the questionnaire in the reply-paid envelope to:

NATCEN (P2719), 101-135 Kings Road, Brentwood, Essex, CM14 4LX.

Department for
**Innovation,
Universities &
Skills**



SN: 1-7 CKL: 8
Issue: 9-10
Card 11 Batch 12-17
SPARE 18-19

STUDENT INCOME AND EXPENDITURE SURVEY 2007/08

Confidential to the Institute for Employment Studies,
and the National Centre for Social Research

Filling in this form will mean that you could take part in the Student Income and Expenditure Survey 2007/08, an extremely important study which is the main source of evidence about student finances in England and Wales. The survey will be carried out in early 2008 among a sample of students who have returned this form and given their permission to be contacted. It is vital to the success of the survey that as many students as possible who receive this form complete it and most importantly give their contact details. **As a gesture of thanks for your co-operation you have been sent a £3 voucher. If you also take part in the study in Spring 2008 you will receive an additional £12 of vouchers.**

Please return the completed form in the pre paid envelope provided. If you have any queries, please contact Emma Pollard or Claire Johnson at IES on 01273 873605/877607 (emma.pollard@employment-studies.co.uk or claire.johnson@employment-studies.co.uk). Thanks for your help.

Section A: Finances

1. Which of the following best describes how you and/or your family will pay for **this year's** tuition fees for your course? (Please tick one box only)

- Pay **full** tuition fees (which can include taking a loan for the full amount) 1 20
- Pay **part** of tuition fees, but not the full amount 2
- Pay no tuition fees 3
- Don't know 4

2. Which of the following best describes how you manage financially these days? (Please tick one box only)

- Manage very well 1 21
- Manage quite well 2
- Get by 3
- Have some financial difficulties 4
- Have a lot of financial difficulties 5

3. Have you applied or do you expect to apply for Access to Learning Funds, Hardship Funds or Financial Contingency Funds from your university or college this academic year? (Please tick one box only)

- Yes – have applied 1 22
- Yes – expect to apply 2
- Don't know yet/Not sure 3
- No 4

Section B: About You

4. Are you: *(Please tick one box only)*
- Male 1 23
- Female 2
5. What is your date of birth? *(Please write in box)* / / 24-31
6. When you applied to your course, where were you living? *(Please tick one box only)*
- England 1 32
- Wales 2
- Scotland 3
- Northern Ireland 4
- In the European Union (but outside of the UK) 5
- Neither in the UK nor the rest of the European Union 6
- Don't know 7
7. What was the highest qualification you had at the start of your current course? *(Please tick one box only)*
- Degree or post graduate qualification 1 33
- Other HE qualification (eg HND, Dip HE, Foundation degree) 2
- GCE 'A'/'AS' level/A2 level or Highers 3
- Vocational/work based qualification (eg NVQ/BTEC) 4
- No formal qualification 5
- Other 6 *(Please specify)* 34-73
8. Did either of your parents attend a university or college of higher education (including polytechnics)? *(Please tick one box only)*
- Yes 1 74
- No 2
- Don't know 3

Section C: Your Course

9. What is the full name of the university or college that you are currently attending? *(Please write in)*
- 101-150
10. Is your current degree/diploma/certificate course or programme full or part-time? *(Please tick one box only)*
- Full-time 1 151
- Part-time 2

11. What is the broad subject area of your current degree/diploma/certificate course or programme? *(Please tick one box only)*
- Medicine and Dentistry 1 152
- Allied to health (eg Nursing) 2
- Other sciences, engineering, technology and IT 3
- Human and social sciences (including law, business, economics and psychology) 4
- Creative arts, humanities and languages (eg English Literature, History) 5
- Education 6
- Other/Combined 7 *(Please specify)* 153-202
12. What level of qualification are you studying for? *(Please tick one box only)*
- Undergraduate degree (eg BA, BSc, BEd, BEng) 1 203
- HND/HNC/Dip HE/Cert HE/Foundation degree 2
- Postgraduate qualification (eg MA, MSc, MEng, MPhil, DPhil, PhD) 3
- PGCE 4
- Not decided yet/Other 5 *(Please specify)* 204-253
13. Is your course a sandwich course? *(Please tick one box only)*
- Yes 1 → Go to Q13b 254
- No 2 → Go to Q14
- 13b. If yes, are you undertaking/have you undertaken a paid placement this year (ie any time between August 2007 and July 2008) as part of this sandwich course? *(Please tick one box only)*
- Yes 1 255
- No 2
14. What year of your course are you currently in? *(Please tick one box only)*
- First year 1 → 256
- Second year 2 →
- Third year 3 → Please turn over and complete details on back page
- Fourth year 4 →
- Fifth year 5 →
- Sixth year 6 →
- Seventh year 7 →
- Eighth year or more 8 →

Name
Address
Address
Address
Address
Postcode

December 2007

Department for
**Innovation,
Universities &
Skills**

Dear Name,

Student Income and Expenditure Survey 2007/08

I am writing to give you an update about progress on this study which is being conducted on behalf of the Department for Innovation Universities and Skills (DIUS) and the Welsh Assembly Government. It is being carried out by the Institute for Employment Studies (IES) and National Centre of Social Research (NatCen). You or your colleagues have previously been in touch with researchers from IES about the study.



Your institution has helped us with this study, by conducting a mailout to students on our behalf, and I would like to thank you very much for this. We are now compiling a sample of students who have agreed to take part.



I wanted to let you know that we will be conducting interviews with students in the Spring Term, starting on the 14th January up until the end of term. This will involve NatCen interviewers calling on those students who have agreed to be contacted, conducting an interview with them and asking them to fill in a seven-day diary of spending (students are sent a £12 voucher to thank them for their participation). Most interviews will take place at students' homes but in a few cases it may be more convenient for students to do the interview on-campus. Our interviewers carry an ID card and are instructed to inform the local police station that they will be working in your area and to report to appropriate staff if they conduct interviews on your institution's site. We would be very grateful if you could copy this letter to any of your staff or colleagues who may come into contact with our interviewers in this way.

If you have any questions, please do not hesitate to contact me or my colleague Jenny Parfement about the study. If there is any information that our interviewers need to be aware of if they visit the campus or university accommodation, or you would prefer them to register with a named contact when on-site, please let us know.

I can be contacted on n.low@natcen.ac.uk or 020 7549 9528 (Monday, Wednesday or Thursday), or Jenny can be contacted on j.parfement@natcen.ac.uk or 020 7549 9517 (Monday-Friday), at National Centre for Social Research, 35 Northampton Square, London, EC1V 0AX.



INVESTOR IN PEOPLE

Yours faithfully,

Natalie Low
Research Director

The Institute for Employment Studies

Mantell Building
University of Sussex
Brighton BN1 9RF, UK
T +44 (0) 1273 686751
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NatCen ID number:

Department for
**Innovation,
Universities &
Skills**

Dear

Student Income and Expenditure Survey 2007/08

I recently interviewed you about yourself and your finances for the Student Income and Expenditure Survey. I also asked you to fill in a seven-day diary of spending which I left with you after the interview.

I returned to pick up your completed diary, but you were not available. Therefore, I would like to remind you to complete the seven-day diary of spending as soon as you can. You can either fill in the diary on-line or fill in the paper diary and return this to the research team in the enclosed reply paid envelope.

You will be sent £12 of Love2Shop vouchers as a thank you when the diary has been completed online or when it has been received by post.

If you have any queries about the diary of spending you can contact the NatCen freephone helpline on 0800 6524574 or e-mail sies@natcen.ac.uk.

Yours sincerely,

.....
NatCen Interviewer

P2719-R



Llywodraeth Cynulliad Cymru
Welsh Assembly Government



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Employment Studies**

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Registered charity no. 258390

Spring 2008
Reference number

Department for
**Innovation,
Universities &
Skills**



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

Student Income and Expenditure Survey 2007/08



Thank you for returning your completed questionnaire in connection with the Student Income and Expenditure Survey. We are now starting the main stage of the study and would like to carry out an interview with you.

The study is for the Department for Innovation, Universities and Skills and the Welsh Assembly Government. The information you give will help to build an up-to-date picture of students' financial support and spending. It will also allow us to assess the impact of recent changes (e.g. variable tuition fees) on students, so that improvements can be made to funding and support arrangements. We are interested in the experiences of all students, whether you are full- or part-time, at the Open University or a distance learner.



The interview will include questions about your tuition fees; any money or financial support you receive (e.g. from your family or university/college or through student loans); your spending (e.g. on rent, bills and living costs); and your experiences of borrowing and debts. **For the interview, it would save time if you could have your letter from the Student Loans Company or other organisations providing student support to hand.** We would also like you to fill in a 7-day diary of spending.

To thank you for helping us with this important study, **we will give you a £12 Love2Shop voucher on completion of the interview and diary.**

As stated in our earlier letter, all of the information you provide will be treated in the strictest confidence in accordance with the Data Protection Act. Information that could be used to identify you will not be shared with anyone outside IES or NatCen without your specific consent. It is intended that the results of the survey will be published and anonymised data may be released for analysis by other researchers.

An interviewer from NatCen will contact you shortly to arrange a convenient time to interview you. He/she will be able to answer any queries about the study; alternatively please contact the NatCen freephone helpline on 0800 6524574 or visit www.natcen.ac.uk/sies.



INVESTOR IN PEOPLE

Yours sincerely

Kalpna Moore
Project manager

**The Institute for
Employment Studies**
Mantell Building
University of Sussex
Brighton BN1 9RF, UK
T +44 (0) 1273 686751
F +44 (0) 1273 690430

The interviewer contacting you will be

Registered office as above
Registered in England
no. 931547

Spring 2008

Reference number:

Department for
**Innovation,
Universities &
Skills**



Llywodraeth Cynulliad Cymru
Welsh Assembly Government



Student Income and Expenditure Survey 2007/08

Recently you were interviewed and filled in a seven-day diary of spending for the Student Income and Expenditure Survey.

We appreciate that students have many demands on their time, and very much value your contribution. Please find enclosed £12 of Love2Shop vouchers to show our appreciation for your help.

If you have any further queries about the study please contact the NatCen freephone helpline on 0800 6524574 or e-mail sies@natcen.ac.uk.

Thank you,

Kalpna Moore

Project manager



INVESTOR IN PEOPLE

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P2719-T

APPENDIX C CODING AND EDITING INSTRUCTIONS

The following documents appear in this appendix:

- CAPI interview coding and editing instructions
- Diary of spending coding and editing instructions
- Additional diary instructions for accepting diaries.

P2719 (Pink Team)

**Student Income and Expenditure Survey
2007/8**

CAPI

Coder Instructions

March 2008

CODER INDEX

Please use the index below to locate the coding instructions.

Edit question	Page number of CODER INSTRUCTIONS
XPTWHY	5
XSUBJCT2	6
XLEAAS	7
XFLWHYN	8
XLWHYN	9
XDSAB2 & XDSAB2AM	10
XWORK3	11
XBEN1	12
XMSCAC	13
XHOUS3/XHOUSA/XHOUE/XHOUSM	14
XQUAL2	15
XWELID	16
XETH	17
NS-SEC	18

BACKGROUND

The Student Income and Expenditure Survey 2007-08 is the latest in a series of surveys originally commissioned by the Department for Education and Skills (DfES) since the mid 1980s. The current study is being commissioned by the (newly formed) Department for Innovation, Universities and Skills (DIUS), along with the Welsh Assembly Government (WAG).

These surveys allow the DIUS and WAG to monitor the impact of its student support arrangements on current students in Higher Education (HE). The interview collects detailed and comprehensive data on students' incomes, expenditure, debt and their experiences of financial hardship.

NatCen carried out the previous round of the survey in 2004/05, in collaboration with the Institute for Employment Studies (IES) and we are working with them again on this round of the study.

Face-to-face interviewing began in January 2008 and will continue until March 2008.

Respondent profile

The sample for this survey is comprised of students studying at universities and colleges in England and Wales, further education colleges (which often run a small number of Higher Education courses) and the Open University.

Questionnaire content

The interview mainly collects details of the finances of the student, but also asks about their experiences of hardship, debt, their attitudes and aspirations and also their family background.

THE EDIT PROGRAMME

Questions requiring editing

There are three types of questions requiring editing within the edit program:

- 'Other - please specify' questions: where respondent's answer does not fit into codes specified prior to interviews and interviewers record text answers.
- Answers to open questions.
- SOC coding: where either the occupation of the student/student's partner or parents are given a standard occupational classification.

Introduction to 'other – specify' and open question codeframes

The codeframes used with the 'other – specify' questions in this survey have been informed by the first 100 cases and the codeframes have usually been extended to take account of the responses given.

At the end of each code frame, standard codes are listed which can be used in the event that you are unable to code the response given:

- 95 'Other specific answer not in codeframe'**
This is for any answer given by the respondent that answers the original question, but is not covered by any of the codes. This can occur because so few respondents have given that particular answer that it's not worth having a specific code for it.
- 96 'Other irrelevant answer'**
This is for recorded responses that don't really answer the question and cannot be coded into any of the other codes.
- 97 'Other answer, not codeable'**
This is for responses where the text recorded does not form recognisable words that the editor can understand.
- 98 Don't know**
- 99 Refusal**

If you use one of the standard 'other' codes you will be asked to code at the following 'Tryback' questions whether the response requires further attention or whether you have queries about how to code a response. The codes at Tryback questions are:

- 3 'Refer to supervisor / Leave for later'**
If you find that you are unable to code the response using the instructions you have been given, please refer your serial number and query to your supervisor. Key '3' at the Tryback question in order to do this. You can then come back to it.

5 'Back coding attempted, leave as is'

In the event that you have consulted your supervisor, and the advice is to leave this question as it is, please use code 5. Also use this code where you are satisfied that the 'other' code you have used does not need to be queried.

Remarks

As you go through the coding, you might find remarks on the questions you are coding. Please open and use these remarks to help you code.

You will find these remarks in the program its self, and on individual factsheets. Please do not spend much time on general and non-specific comments that fail to answer the question, only the answers to the questions that the interviewer has recorded in a note rather than correctly coding it in the original codes.

Navigating the edit program

In each case, pressing the 'end' key takes you to the next question requiring editing. Throughout the program responses are being coded into new edit questions, whose names start with the letter 'X'. You should be automatically taken to the appropriate edit question, 'Tryback', or SOC coding question which provides instructions on the text requiring coding and the variable name you should code it into.

SOC coding

SOC coding occurs at the end of the edit program for you to code the respondent's or respondents' partner's or parent's current or most recent job.

Press the spacebar to bring up the SOC coding window and then Alt+L to start the computer assisted coding.

Factsheets

The factsheets for this edit show the following information:

- serial number and batch number
- date of interview, outcome, program version
- Background information about student:
 - where student is studying (England or Wales)
 - where domiciled (England or Wales)
 - Support package eligible for (new or old system student)
 - Mode of study- full/part-time or OU
- An indication of the types of coding required (back-coding and SOC coding)
 - answers for coding
 - answers for SOC coding
 - any remarks

Soft checks

Soft checks will appear when you are navigating the edit program. Please suppress these as you go through the edit.

Interview length

If the question which asked interviewers to record the length of the interview (called IntLen1) comes on route please enter <CONTROL> and <K> to get past this point.

Questions to be edited:

PTWHY + PTWHYSP (In Q.INTRO block)

Edit question: XPTWHY

“Why did you choose to study part-time (with the OU)?”

ORIGINAL CODE FRAME:

1. Only option available / no suitable full-time course available
2. Had a full-time job / wanted to continue working
3. Have family commitments/caring for household member
4. Had to study part-time to avoid reductions in social security benefits/allowances
5. Could not afford to study full-time
6. Because of the new student funding regime
7. Did not have entry qualifications to study full-time
8. Other

NEW CODES:

9. Employment requirement/sponsorship/on the job training
10. Suits lifestyle/part-time job
11. Could not cope with full-time course (e.g. medical reasons)
12. To re-sit exams

95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- Fitted in with my job
- My work is paying for it
- Health reasons
- It's part of my full-time job
- Difficult to find childcare
- Have a part-time job and wanted to continue working

SUBJECT2 + SUBJECT3 (In Q.INTRO block)

Edit question: XSUBJECT2

“From the answers on this card how would you describe your *main* subject?”

ORIGINAL CODE FRAME:

1. Medicine and Dentistry
2. Subjects allied to Medicine
3. Biological Sciences
4. Veterinary Science
5. Agriculture and related subjects
6. Physical Sciences (including Chemistry and Physics)
7. Mathematical Sciences
8. Computer Sciences
9. Engineering and Technology
10. Architecture, Building and Planning
11. Social Studies (including Economics, Politics and Geography)
12. Law
13. Business and Administrative Studies
14. Mass Communications and Documentation
15. Languages (including Classics)
16. Historical and Philosophical studies
17. Creative Arts and Design
18. Education
19. Combined
20. Unsure/other

NEW CODES:

21. Counselling
22. Music studies
23. Psychology
24. English literature/ English language/ Literacy studies
25. Criminology/ Criminal justice studies
26. Sports Science studies

95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

NB

- Nursing and other medical subjects should be coded as 2 “Subjects allied to medicine”

Examples of answers to be coded:

- Music
- Psychology
- English literature
- Optometry
- Nursing and healthcare
- Sports studies
- Social work
- Business and Arts
- Dance

LEAAS1 + LEAAS2 (In Q.FEES block)

Edit question: XLEAAS

“IF AN APPLICATION HAS BEEN MADE: Whose income was taken into account in the application for financial support for tuition fees in this academic year?

IF NO APPLICATION WAS MADE: Whose income *would* have been taken into account if you had applied for support with your tuition fees?”

ORIGINAL CODES

1. Your own
2. Your natural parent(s)
3. Your step-parent(s)
4. Your legal guardian (s)
5. Your spouse’s
6. Your partner’s or co-habitee’s
7. Any other person’s

NEW CODES:

8. No income assessed

95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- No-one
- Son’s

FLWHYN +FLWHYNS (In Q.Fees block)

Edit question: XFLWHYN

“Why have you decided *not* to take out a Student Loan for Fees this academic year?”

ORIGINAL CODES:

1. I do not need the money to pay for my fees
2. I prefer to get a paid job rather than take out a loan
3. My parents/partner did not want me to
4. I am concerned about the repayments
5. Religious beliefs that do not permit paying interest
6. I do not like borrowing and am concerned about taking on more debts
7. I prefer to borrow from elsewhere
8. Still using up a loan taken out in a previous year
9. Other
10. None of these

NEW CODES:

11. Receives other funding
95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- Because I knew my parents' income would be too high
- Not eligible
- Application made but was refused for this course
- Because the grant is paying for them

LWHYN + LWHYNS (In Q.Heinc block)

Edit question: XLWHYN

“Why have you decided *not* to take out a Student Loan for Maintenance this academic year?”

ORIGINAL CODES:

1. I do not need the money to cover my living costs
2. I prefer to get a paid job rather than take out a loan
3. My parents/partner did not want me to
4. I am concerned about the repayments
5. Religious beliefs that do not permit paying interest
6. I do not like borrowing and am concerned about taking on more debts
7. I prefer to borrow from elsewhere
8. Still using up a loan taken out in a previous year
9. Other
10. None of these

NEW CODES:

11. Receives other funding
95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- Not eligible
- Didn't know about them
- Do not want to be in debt

DSANB2 (In Q.Heinc block)

Edit questions: XDSAB2 and XDSAB2AM

“INTERVIEWER WRITE IN ANY DETAILS OF THE DISABLED STUDENT ALLOWANCE THAT HAVE NOT BEEN COVERED ELSEWHERE IN THE QUESTIONNAIRE (Open answ)”

The aim of this original question was to pick up any details of the disabled students allowances that have not been covered in the questionnaire (because these allowances can be quite complicated with students receiving money, being given equipment and/or having a supplier paid on his/her behalf)

XDSAB2

The aim of this edit question XDSAB2 is to capture the responses to the question (whatever the responses are)

NEW CODES:

1. Doesn't know what they will receive
2. Still to apply
3. Has not received anything yet
4. Received equipment/object
5. Supplier paid on students behalf

95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

XDSAB2AM

The purpose of this second edit question is to record amounts of money mentioned or estimated in XDSAB2 *if they are mentioned*. Please record the total amount of money mentioned if more than 1 figure is mentioned, as we would like to know the total amount of money the items/services are worth.

NEW CODE = a numeric amount of £s that is mentioned in XDSANB2

If no amount of money is mentioned, press <CONTROL> and <K>

Examples of answers to be coded:

- Don't know
- Allowance for dyslexia, amount unknown
- Awaiting details

WORK3 + WORK3sp (In Q.OTHinc block)

Edit question: XWORK3

“In which ways have your university work and studies been affected by your paid work?”

ORIGINAL CODES:

1. Less worry about finance so more relaxed in study
2. Cannot spend enough time on university work therefore reduces quality of my work
3. Missing lectures and classes
4. Less time studying and reading
5. Less time to revise for exams
6. More difficulty accessing university library and computers
7. Less time sleeping
8. Increased levels of stress/overload
9. Less time for leisure and sports
10. Other
11. None of these

NEW CODES:

12. Less time to spend with family/friends/socialising
95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- Leaves limited time for assignments and exams
- Socialising- I don't get to see my friends
- I am constantly on call

BEN1 + BEN2 (In Q.OTHinc end)

Edit question: XBEN1

“I’m now going to ask you about social security benefits.

During this academic year, have you received or do you expect to receive any of these benefits or allowances in your own right (IF MARRIED/LIVING WITH PARTNER or in your partner’s name)?”

ORIGINAL CODES:

1. Child Benefit
2. Child Tax Credit
3. Retirement Pension or Widow’s pension
4. Pension credit
5. Carers’ Allowance (previously Invalid Care Allowance)
6. Any disability/invalidity/incapacity/sickness benefit
7. Working Tax Credit
8. Job Seeker’s Allowance (JSA) / Other unemployment benefits
9. Income Support
10. Housing Benefit
11. Local Housing Allowance
12. Other state benefits
13. None of these

NEW CODES:

14. Council Tax Benefit
95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don’t Know
99. Refusal

Examples of answers to be coded:

- Disability Living Allowance
- Free NHS prescriptions
- Child Benefit
- Dependents Pension

MISCAC + MISCACsp (In Q.OTHinc block)

Edit question: XMISCAC

“Apart from the things that we have already talked about, have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) received, or do you expect to receive, any money generated from any other sources *during this academic year*, for example from any of the ones listed on this card, if so which ones?”

ORIGINAL CODES:

1. Pension
2. Trusts
3. Deed of Covenant
4. Shares (including PEPs, TESSAs and Unit Trusts)
5. Tax refund
6. Interest from bank and building society accounts
7. Windfalls from building society mergers/ takeovers/ flotations
8. Other
9. None of these

NEW CODES:

10. Compensation/settlement
11. Premium bonds
12. Endowment policy
13. Future loans

95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- Sale of house
- Inheritance
- Endowment policy

HOUS3 + HOUS3sp (In Q.Spend block)

Edit question: XHOUS3

&

HOUSa + HOUSasp (In Q.Spend block)

Edit question: XHOUSa

&

HOUSE + HOUSEsp (In Q.Spend block)

Edit question: XHOUSE

&

HOUSm + HOUSmsp (In Q.Spend block)

Edit question: XHOUSm

ORIGINAL CODES:

“Which of the following best describes where you live?”

1. Alone in rented house/flat/lodgings
2. Alone in a flat/house you are buying or own
3. With parents/step-parents or spouse’s parents
4. In a house/flat owned by your parents/step-parents (but not living with them)
5. With a spouse/partner/relatives or children in a flat/house I/we are buying or own
6. With a spouse/partner/relatives or children in a flat/house I/we rent
7. With friends/students in a rented house/flat/lodgings (not provided by your University/college)
8. University/College provided accommodation e.g. halls of residence/student flat/hostel
9. Other

NEW CODES:

10. Living/travelling abroad

95. Other specific answer not in codeframe

96. Other irrelevant answer

97. Other answer, not codeable

98. Don't Know

99. Refusal

NB

If you are not sure which answer to code back into, it may be helpful to look at the answer recorded at HHNUMB towards to start of the questionnaire. This tells you how many people the student lives and shares financial responsibility with. This can help you decide which code to use as it will give you an idea of whether the student lives alone or with others.

Examples of answers to be coded:

- Living in my own house with 2 children
- Grandparents
- In my parents’ house
- Boyfriend’s house
- Narrow boat

QUAL2 (In Q.BACK block)

Edit question: XQUAL2

“Which of these was your highest qualification before studying at (university/college/Open University)?”

ORIGINAL CODES:

1. Foundation Year
2. Foundation Degree
3. A levels (including A2/AS levels) or International Bacclaureate
4. Scottish highers
5. GNVQ/NVQ Level 3/ AVCEs
6. GCSEs/O Levels
7. BTEC National Diploma
8. Qualification from an Access course
9. Other

NEW CODES:

10. HNC
11. HND
12. Qualification from institute outside England/Wales
13. BA/BSC
14. Master degree
15. Foundation qualification
16. Diploma in nursing
17. Diploma (other)

95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- HND
- BSc in bio-medical science
- Qualification from Poland
- Professional Diploma in law from institute of legal executives
- Higher National Certificate

WELID + WELIDsp (In Q.BACK block)

Edit question: XWELID

“What do you consider your national identity to be. Please choose your answer from the card? Choose as many or as few as apply?”

ORIGINAL CODES:

1. Welsh
2. English
3. Scottish
4. British
5. Other

NEW CODES:

6. Irish
95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

Examples of answers to be coded:

- Irish
- African
- British and Trinidadian

ETH + ETHOTH (In Q.BACK block)

Edit question: XETH

“To which of these groups do you consider you belong?”

ORIGINAL CODES:

1. White - British
2. White - Irish
3. Any other white background (please describe)
4. Mixed - White and Black Caribbean
5. Mixed - White and Black African
6. Mixed - White and Asian
7. Any other mixed background (please describe)
8. Asian or Asian British - Indian
9. Asian or Asian British - Pakistani
10. Asian or Asian British - Bangladeshi
11. Any other Asian/Asian British background (please describe)
12. Black or Black British - Caribbean
13. Black or Black British - African
14. Any other Black/Black British background (please describe)
15. Chinese
16. Other

NEW CODES:

90. Any other white background
91. Any other mixed background
92. Any other Asian/Asian British background
93. Any other Black/Black British background

95. Other specific answer not in codeframe
96. Other irrelevant answer
97. Other answer, not codeable
98. Don't Know
99. Refusal

NB.

Note that it is not possible to back-code to codes 3, 7, 11 and 14. Please try to back-code into the original codes where possible. If the response to ETHOTH does not fit into any of the original codes it can be coded into the new mixed codes 90 to 93.

Examples of answers to be coded:

- Polish
- South African
- Russian
- White Latin
- Arabic

Socio-economic coding

SOC, SIC and NS_SEC coding needs to be applied to questions asking about the students working background.

These questions are *similar* to the normal NS-SEC questions, however in this survey the classification may be focusing on the student's current job, his/her last job or the chief income earner in their household (depending on if they are seen as relying on their parents income or not earlier).

Therefore the process of NS-SEC coding is the same, but it may refer to either:

- Awork1 to Awork12
- Bwork1 to Bwork12
- or Cwork1 to Cwork12).

You will only code NS-SEC once for each serial number.

THANKS!

Any questions, please call **XXX in the Pink team.**

P2719 (PINK TEAM)



STUDENT INCOME AND EXPENDITURE SURVEY 2007/08

DIARY OF SPENDING CODER INSTRUCTIONS

March 2008

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BACKGROUND:

Student diary of spending:

The student spending diary is an addition to the Student Income and Expenditure Survey interview. This diary is filled in by students for seven days after the main interview.

The aim of the diary is to pick up day-to-day spending that was not covered in the questionnaire.

The diary covers seven days of various types of daily spending, including:

- Travel
- Lifestyle/Entertainment
- Personal items
- Child-related spend
- Food and drink outside the home
- Household items
- Other spending that has not been covered elsewhere.

The paper diary has seven identical double pages, one for each the 7 days it is filled in for.

There is also a web version of the diary. This is as similar to the paper diary as possible and is set out in the same way, with 7 days of possible spending with the same categories. Students were given web ID numbers and passwords to give them access to their own copy of the diary.

The diary data (paper or web) and the questionnaire data will be analysed together to give an overall measure of spending.

Therefore it is important in the editing process that we take into account whether or not diary items have already been asked about in the main questionnaire or not.

EDITING THE DIARY:

For each day filled in on the diary there are 4 'other' items which may need editing.

The aim of these "other" codes was to allow students to write in spending that did not fit into the existing categories in the diary. Three of the other codes could be any category or type of spending, whilst one should fit in the 'lifestyle/ entertainment section' categories.

The aim of editing the diary is to either;

1. **CODE TO EXISTING CATEGORIES:** Re-code "other spending" into one of the existing categories in the diary

OR

2. **CODE TO NEW OTHER CATEGORY NOT ASKED ABOUT IN QUESTIONNAIRE:** Code other spending into a new 'other' category of spending that is has not already been asked about in the main questionnaire

OR

3. **CODE TO NEW OTHER CATEGORY ALREADY ASKED ABOUT IN QUESTIONNAIRE:** Code other spending into a new 'other' category of spending that has already been asked about in the main questionnaire

Option 3 is particularly important, as we do not want to double-count items included in the diary that have already been covered in the interview. Throughout this coding guide we have included lists of spending already covered in the questionnaire.

CODING AMOUNTS:

When editing, your role is to assign the amount of money spent on this original “other” item into the most appropriate variable.

The process is:

1. Locating the “other” variable to be edited in the DDF
2. Looking at the description of the “other” entry in the paper diary (or web diary) by looking at the paper diary using the batch reference
3. Deciding where the spending should be coded to
4. Looking to see if the variable into which you are adding the “other” amount into is empty
5. If the variable is empty, enter the “other” amount into this variable
6. If the variable already contains an amount of money, please work out what the “other” amount and the amount already in the variable *add up to*, and amend the variable to reflect this. E.g. if an “other” variable is £1.50 and you want to code this into a variable already containing £3.25, then the new total of the variable should be £4.75.
7. Deleting the original “other” answer.

Answers should be entered showing pounds and pence with leading zeros so that all figures have 5 digits.

E.g. £23.44 would be entered as 02344

If the verbatim answer contains two different types of spending e.g. ‘DVD and toiletries (£29.00), please halve the amount and re-code the items and amounts separately, so that £14.50 is allocated to the DVD and £14.50 is allocated to the toiletries.

It is crucial that the “other codes” are allocated on the correct day of spending. All day one spend variables start with “D1”, day 2 variables start with “D2”, day 3 variables start with “D3” etc.

In this coder guide all the variables start with “D1” indicating that the coder briefing is referring to day 1 of the diary. In the actual editing, you will be dealing with all seven days of the diary.

The days of the week that the diary is filled in for

Another part of the editing process is to check that the diary has been filled in for each of the 7 days of the week.

We asked students to fill in the diary for the days written on the front cover of the diary. The dates were specific and covered one week of consecutive days.

However, if the student made a mistake they may not have filled the diary in for the specified days. This is acceptable if they have filled the diary in for a Monday, a Tuesday a Wednesday, a Thursday, a Friday, a Saturday and a Sunday (even if these do not make a true week).

But the data is *not* acceptable if there are days of the week *missing* (e.g. no Tuesday) or if days have been duplicated.

For example the following diary would be acceptable:

Sun 17th April
Mon 18th April
Tues 19th April
Weds 27th April
Thurs 28th April
Fri 29th April
Sat 30th April

However, this would not be acceptable:

Sun 17th April
Mon 18th April
Tues 19th April
Thurs 28th April
Fri 29th April
Sat 30th April
Sun 1st May

(because there are 2 Sundays and no Wednesday)

The rest of this coding guide explains how to classify these original verbatim “other” items and decide how to re-allocate the spending.

Please do not hesitate to contact the research team with any queries relating to the diary editing and coding as there may be difficult editing decisions.

'TRAVEL' ITEMS IN THE DIARY:

Original codes:

D1TRA Fares paid between college or work and home

D1TRB Fares paid for leisure travel

D1TRC Fares paid to and from child's school/ nursery etc (if applicable)

D1TRD Petrol for a car, van, motorbike or scooter.

D1TRE Parking paid for college or work

D1TRF Parking paid for leisure

New codes:

D1TRX Other travel NOT covered in questionnaire/diary

D1TRQ Other travel covered in questionnaire

ITEMS COVERED IN MAIN QUESTIONNAIRE

- Motor vehicle tax
- Motor insurance
- Vehicle repairs
- Vehicle maintenance
- Journeys to and from parental/family home during and at start/end of term
- Buying a Bike/Moped/Motorcycle
- Buying a Car/Van
- Field trips and trips for study/coursework
- Holidays (travel there, accommodation and spending money whilst there)

Examples of “other” answers in the diary to be edited:

Other item	Existing code in diary?	Covered in main qre?	Code to be used	IMPORTANT NOTES
Travel to and from hospital for operation: £35	✓		D1TRB	All fares that are <i>not</i> related to study or work should be considered for <i>leisure</i> purposes
Taxi home from work: £4	✓		D1TRA	
Taxi home from night-out: £7	✓		D1TRB	
Taxi: £8	✓		D1TRB	Travel where the purpose is not specified should be considered as leisure travel
Bulbs for car £36		✓	D1TRQ	Vehicle maintenance to be coded as XD1TRQ
Car insurance £220.71		✓	D1TRQ	
Car wash: £2.30		✓	D1TRQ	
Bike-oil: 99p		✓	D1TRQ	Vehicle parts to be coded as XD1TRQ
Car MOT £35		✓	D1TRQ	
Early payment of holiday £85		✓	D1TRQ	Spend on holidays was covered in the main questionnaire
Holiday flights £63.26		✓	D1TRQ	
Stayed in hotel: £40		✓	D1TRQ	Consider this as holiday spending
Travel insurance: £29		✓	D1TRQ	Consider this as holiday spending
Hospital parking fees: £2		✗	D1TRX	All parking to be coded as XD1TRX
Parking fine: £30		✗	D1TRX	

‘LIFESTYLE / ENTERTAINMENT’ IN THE DIARY:

Original codes:

DILIFA Cinema, theatre, concerts

DILIFB Entry to night-clubs, discos etc

DILIFC Sports (spectating or participating), hobbies, clubs and societies

DILIFD Religious activities

DILIFE National lottery or betting

DILIFF Other entertainment (*DO NOT RE-USE IN EDITING*)

New codes:

DILIFX New other lifestyle/entertainment NOT covered in questionnaire/diary

DILIFQ New other lifestyle/entertainment covered in questionnaire/diary

ITEMS COVERED IN MAIN QUESTIONNAIRE:

- No lifestyle questions are asked in the questionnaire

Examples of “other” answers in the diary to be edited:

Other item	Existing code in diary?	Covered in main qre?	Code to be used	IMPORTANT NOTES
Swimming club: £3.95	✓		DILIFC	Sporting activities is an existing category
Ice-skating: £5.50	✓		DILIFC	
Bowling: £6	✓		DILIFC	
Wool for knitting: £8.40	✓		DILIFC	Anything hobby or past-time related should be coded as DILIFC
Art materials: £19.00	✓		DILIFC	If the description does not say that any equipment or materials is for their course, assume that it is for personal use
Puzzles: £4	✓		DILIFC	
Laser quest (2 games): £7.50		✗	DILIFX	
Pub quiz: 50p		✗	DILIFX	
Ball ticket: £29.00		✗	DILIFX	
Wedding exhibition: £5		✗	DILIFX	

NB: The original code ‘Other lifestyle/entertainment’ DILIFF, cannot be coded into. This is now redundant.

'PERSONAL ITEMS' IN THE DIARY:

Original codes:

D1PERA	Clothes, shoes, accessories etc
D1PERB	CDs, downloaded music, DVDs, videos etc (bought or rented)
D1PERC	Cigarettes, tobacco
	D1PERD Newspapers, magazines, books, stationary or postage (not needed for your course)
D1PERE	Gifts and cards e.g. for birthdays
D1PERF	Prescriptions and other medicines
D1PERG	Toiletries

New codes:

D1PERX	Other personal items NOT covered in questionnaire/diary
D1PERQ	Other personal items covered in questionnaire

ITEMS COVERED IN MAIN QUESTIONNAIRE:

Items costing more than £50

- Sports equipment not for your course
- Mobile phone
- Photographic equipment
- Glasses / contact lenses
- Dental or medical treatment (including prescription costs and medical insurance)
- TV
- TV licence
- Video recorder/player
- DVD player
- CD player / hi-fi equipment / radio / personal stereo / ipod
- Computer not for course

Items at any cost

- Mobile phone costs (including pre-pay and top-up)
- Landline cost

NB

Spend in connection with study is covered later in the coder guide.

Examples of “other” answers in the diary to be edited:

Other item	Existing code in diary?	Covered in main qre?	Code to be used	IMPORTANT NOTES
Eye-drops: £36.40	✓		D1PERF	Medicines should be coded as D1PERF
Contact lens solution: £5.49	✓		D1PERG	
Socks: £4.49	✓		D1PERA	
Costume for fancy dress: £6	✓		D1PERA	
Rented DVD: £3	✓		D1PERB	
Postage: £1.80	✓		D1PERD	
Dictaphone: £59.98		✓	D1PERQ	This should have been covered in the questionnaire under “CD player / hi-fi equipment / radio / personal stereo / ipod costing more than £50”
Phone bill £9		✓	D1PERQ	Mobile and landline phone costs are covered in the questionnaire so should be coded as D1PERQ
Internet bill £40.00		✓	D1PERQ	Internet costs should be coded as D1PERQ
Glasses £130		✓	D1PERQ	
Dentist £180		✓	D1PERQ	
TV licence: £121		✓	D1PERQ	
XBOX video game: £19.99		✗	D1PERX	It is important to note how much personal items cost, because if they cost more than £50 they may have been asked about in the main questionnaire (like the dictaphone above)
Cold water dye: £1.94		✗	D1PERX	
Battery charger: £9.99		✗	D1PERX	
Photograph developing: £4.80		✗	D1PERX	
Sun-bed session: £2.50		✗	D1PERX	All beauty treatments should be coded as D1PERX as these were not covered in the questionnaire
Haircut: £30		✗	D1PERX	

‘CHILD-RELATED SPEND’ IN THE DIARY:

Original codes:

D1CHA Play school, nursery or crèche fees

D1CHB Babysitting, child-minding, au pair or nanny

D1CHC School lunches and milk

D1CHD Toys, children’s books or other children’s gifts

D1CHE Child’s outings/entertainment

D1CHF Other spending for children

New codes:

- There are no new codes.
- All other spending relating to children can be re-coded into the *original* ‘other spending for children’ item called D1CHF.
- It is not necessary to know what child related spend was covered in the diary for spending related to children.

Examples of “other” answers in the diary to be edited:

Other item	Existing code in diary?	Covered in main qre?	Code to be used	IMPORTANT NOTES
Took baby sister out: £10	✓		D1CHF	All “other” child related spend should be coded into D1CHF
Breakfast Club: £1.50	✓		D1CHF	
Children’s toys: £10	✓		D1CHD	

'FOOD AND DRINK OUTSIDE THE HOME' IN THE DIARY:

Original codes:

D1FDA Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises

D1FDB Beer, wine, spirits or other alcoholic drinks

D1FDC Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)

New code:

D1FDX Other food/drink (non alcoholic) NOT covered in diary

ITEMS COVERED IN MAIN QUESTIONNAIRE:

- The only food/drink covered in the diary is children's school and packed lunches (which is under the 'child related spend' category)

Examples of "other" answers in the diary to be edited:

Other item	Existing code in diary?	Covered in main qre?	Code to be used	IMPORTANT NOTES
Meal at restaurant: £10.00		X	D1FDA	
Coffees whilst out: £5.40		X	D1FDA	
Round of drinks		X	D1FDB	Assuming these are alcoholic drinks

NB

The next section in the diary and this coding guide relates to food and drink bought to consume inside the home (e.g. grocery shopping, going to an off-licence etc)

‘HOUSEHOLD ITEMS’ IN THE DIARY:

Original codes:

D1HOUA	Food and drink bought to consume at home (except take-away meals/alcoholic drinks)
D1HOUB	Beer, wine, spirits or other alcoholic drinks bought to consume at home
D1HOUC	Household goods, cleaning materials, pet food etc
D1HOUD	Servicing or repairs to personal or household equipment
D1HOUE	Laundry or dry cleaning
D1HOUF	Payments into a kitty or common pool (excluding a joint account)

New codes:

D1HOUX	Other household items NOT covered in questionnaire/diary
D1HOUQ	Other household items covered in questionnaire

ITEMS COVERED IN MAIN QUESTIONNAIRE:

Items costing more than £50

- Washing machine/dryer
- Fridge
- Other consumer durables
- Furniture/carpet
- Bedding
- Small household appliances
- Buildings/household or contents insurance

Examples of “other” answers in the diary to be edited:

Other item	Existing code in diary?	Covered in main qre?	Code to be used	IMPORTANT NOTES
Food for birthday party: £43.62	✓		D1HOUA	
Window cleaner: £6.50	✓		D1HOUD	
Pet food: 52p	✓		D1HOUC	
Building and contents insurance annual £280.99		✓	D1HOUQ	
Padlock and key: 99p		✗	D1HOUX	
Collar and lead for dog: £6.30		✗	D1HOUX	

NB TV/Video/hi-fi equipment etc should be coded under the ‘personal items’ category rather than ‘household’.

OTHER SPENDING THAT HAS NOT BEEN CATEGORISED SO FAR:

If there are outstanding items that do not fit into any of the previous categories of spending in the diary, then they should be allocated to one of the remaining new codes:

NEW CODES:

D1STQ1	Spending relating to study covered in the questionnaire (<i>one-off</i> payment)
D1STQ2	Spending relating to study covered in the questionnaire (<i>regular</i> payment)
D1X1	Other specific item (<i>one-off</i> payment) NOT covered in questionnaire
D1X2	Other specific item (<i>regular</i> payment) NOT covered in questionnaire
D1Q1	Other specific item (<i>one-off</i> payment) covered in questionnaire
D1Q2	Other specific item (<i>regular</i> payment) covered in questionnaire

NB

- All items relating to study have been covered in the main questionnaire
- From the description of the item, please estimate if the payment is a one-off payment over the year or whether it is a regular payment the student might make **each month**.
- If it is not possible to tell from the description of the item if it is a one-off payment follow this rule:
 - if it is £20 or more, it is a one-off payment
 - if it is £19.99 or less, it is a regular payment

Please do not hesitate to contact the research team with any queries relating to these codes as this coding may be quite complicated

COURSE RELATED SPEND COVERED IN MAIN QUESTIONNAIRE:

- Computer for course work
- Postage and stationery relating to study/coursework
- Books for study/coursework
- Photocopying/printing
- Special equipment for study/coursework
- Trips connected with study is covered in the 'travel' section

GENERAL ITEMS COVERED IN MAIN QUESTIONNAIRE:

- Loan repayments
- Credit card repayments (including store cards)
- Hire Purchase (HP) repayments
- Catalogue repayments
- Tuition fees
- Rent
- Mortgage
- Retainer for accommodation
- Council tax payments
- Bills for water, gas, electricity, fuel
- Maintenance payments
- Miscellaneous regular payments worded "*any other payments on a regular basis such as life assurance, pensions, investment savings or a mortgage in which you are not actually living in?*"

Examples of “other” answers in the diary to be edited:

Other item	Existing code in diary?	Covered in main qre?	Code to be used	IMPORTANT NOTES
Tuition fees £230		✓	D1STQ1	Assume a one-off Study related spend
Revision guides for course £16.50		✓	D1STQ1	Assume a one-off Study related spend
Abode in design tutorial CD £93		✓	D1STQ1	Assume a one-off payment Study related spend
Presentation display book and binder file £9.67		✓	D1STQ2	Assume a <i>regular</i> payment Study related spend
Paper for printer & acetates £32.46		✓	D1STQ1	Assume a one-off payment Study related spend
..... £38.99		?	D1Q1	Anything without a description should be considered as a <i>one-off</i> payment covered in the questionnaire
AA loan £246		✓	D1Q1	Assume a one-off payment Covered in the questionnaire
Paid credit card off £97		✓	D1Q1	Assume a one-off payment Covered in the questionnaire
Visa bill £50		✓	D1Q1	Assume a one-off payment Covered in the questionnaire
Gas bill £40.30		✓	D1Q1	Assume a one-off (as it is less than monthly and is over £20) Covered in the questionnaire
Accommodation fees for son: £900		✓	D1Q2	This should have been picked up in the questionnaire under “ <i>Miscellaneous regular payments</i> ”
Rent £175		✓	D1Q2	Assume a <i>regular</i> payment Covered in the questionnaire
Payment for board and lodging for three weeks £75		✓	D1Q2	Assume a <i>regular</i> payment Covered in the questionnaire
Building work-porch roof: £550		✗	D1X1	Assume a one-off payment Not covered in qre
Horse physiotherapist: £55		✗	D1X1	You can't tell if this is one-off or regular spend, therefore following the rule of £20 means this should be coded as D1X1
Passport photos £3.00		✗	D1X1	Assume a one-off payment Not covered in qre
Loan to a friend £10		✗	D1X1	Assume a one-off payment Not covered in qre
Library fines: £3.50		✗	D1X1	Assume a one-off payment Not covered in the questionnaire
Donation to charity: £2		✗	D1X1	Assume a one-off payment Not covered in the questionnaire
Phone call from phone box: 50p		✗	D1X2	Assume a <i>regular</i> payment Not covered in the questionnaire

P2719 (PINK TEAM)



STUDENT INCOME AND EXPENDITURE SURVEY 2007/08

ADDITIONAL INSTRUCTIONS FOR ACCEPTING DIARIES

March 2008

How diaries were filled in

One part of the editing process for the diary is to check that diary has been filled in for each of the 7 days of the week. We asked students to fill in the diary for the days written on the **front cover** of the diary. The interviewer wrote the dates on the front cover which covered one week of consecutive days. Then on each **page of the diary** corresponding to a particular day, the students were asked to write in that day and date themselves (for the actual day they filled out the spending for).

We need the student to have filled in a diary for each day of a week. We asked them to do this for 7 consecutive days and most students will have followed these instructions.

However, if the student made a mistake they may not have filled the diary in for the specified days. It was acceptable for them to leave gaps between days or fill days in out of order **as long as there is an entry corresponding for each different weekday and day of the weekend**, i.e. they have filled the diary in for a Monday, a Tuesday a Wednesday, a Thursday, a Friday, a Saturday and a Sunday (even if these do not make a true week).

A diary is *not* acceptable if there are days of the week *missing* (e.g. no Tuesday) or if days have been duplicated.

For example the following diaries would be acceptable:

Sun 17 th April	Sun 17 th April
Mon 18 th April	Mon 18 th April
Tues 19 th April	Tues 19 th April
Weds 27 th April	Weds 27 th April
Thurs 28 th April	Thurs 28 th April
Fri 29 th April	Fri 22 nd April
Sat 30 th April	Sat 23 rd April
(gap in week)	(days out of order)

However, this would not be acceptable:

Sun 17th April
Mon 18th April
Tues 19th April
Thurs 28th April
Fri 29th April
Sat 30th April
Sun 1st May
(because there are 2 Sundays and no Wednesday)

Queries about the day and date information written in by students

Some queries have already arisen so here are some additional instructions to clarify the following situations:

- Diaries with gaps in weeks or days out of order;
- Diaries with missing days or duplicate days;
- Diaries where day/date information is missing;
- Diaries with inconsistent day/date information;
- Other diaries where you suspect the diary is incomplete or incorrectly filled out.

In general, the options are:

- To correct or add day/date information and ACCEPT the diary (and then perform other editing task required);
- To REJECT the diary (outcome code 14)
- To REFER the diaries to the researchers, Jenny and Natalie, on the project.

Overleaf are listed the main problems you might find with the day and date information. Please locate the problem and then go through checklist of questions under that problem until you get to an ACCEPT, REJECT or REFER. The problems covered are:

- 1) All days/dates written in...
 - a) but days/dates out of order
 - b) but gaps between days
- 2) All days written in but no dates written in
- 3) All dates written in but no days written in
- 4) No day or date information written in at top of any of the pages
- 5) Dates and days are written in but they are inconsistent with each other (e.g. Monday 11th March rather than Monday 10th March).
- 6) Some dates and/or days are written in but others are missing
- 7) Any other day/date problem

If you are in any doubt, please refer!!

PROBLEM	CHECK	WHAT TO DO
1. ALL day/dates written in but...		
...days/ dates out of order	Has each different day of the week/weekend been written in, and there are NO duplicate or missing days?	If yes, ACCEPT For example, accept: Mon 1 st , Tues 2 nd , Weds 10 th , Thurs 11 th , Fri 5 th , Sat 6 th , Sun 7 th . If no, REJECT. For example, reject:: Mon 1 st , Tues 2 nd , Weds 3rd, Fri 5 th , Sat 6 th , Sun 7 th , Mon 8 th (NO WEDS, 2 X MON)
...gaps between days.	Has each different day of the week/weekend been written in, and there are NO duplicate or missing days?	If yes, ACCEPT For example, accept: Mon 1 st , Tues 2 nd , Weds 10 th , Thurs 11 th , Fri 12 th , Sat 13 th , Sun 14 th . If no, REJECT
2. ALL days written in (e.g. Mon, Tues) but NO dates written in		
	Has each different day of the week/weekend been written in, and there are NO duplicate or missing days?	If yes, check next question below. If no, REJECT
	Is the diary completely blank, i.e. there are NO spending entries on any of the days?	If yes, check notes for any indication of why there is no spending. in-fill missing dates and ACCEPT if explanation given. REFER If no explanation. If no, check next question below.
	Are there spending entries throughout the week (even if some days have zero spending) or clear indication of why days had zero spending (e.g. something written on the notes page or a diary page crossed through)?	If yes, infill missing dates and ACCEPT. If no, check next question below.
	Is there a 'suspicious' pattern of spending entries that suggests the diary is incomplete, e.g. the 1 st couple of days have entries, and the rest are blank?	IF yes or in doubt, REFER If no, infill missing dates, ACCEPT

3. ALL dates written in (e.g. 26/01/08, 27/01/08) but NO days written in	
Do the dates written in imply each different day of the week/weekend been written in, and there are NO duplicate or missing days?	If yes, check next question below. If no, REJECT
Is the diary completely blank, i.e. there are NO spending entries on any of the days?	If yes, check notes for any indication of why there is no spending. Infill missing days and ACCEPT if explanation given. REFER If no explanation. If no, check next question below.
Are there spending entries throughout the week (even if some days have zero spending) or clear indication of why days had zero spending (e.g. something written on the notes page or a diary page crossed through)?	If yes, infill missing days and ACCEPT. If no, check next question below.
Is there a 'suspicious' pattern of spending entries that suggests the diary is incomplete, e.g. the 1 st couple of days have entries, and the rest are blank?	IF yes or in doubt, REFER If no, infill missing days, ACCEPT
4. NO day or date information written in at top of any of the pages	
Is the diary completely blank, i.e. there are NO spending entries on any of the days?	If yes, check notes for any indication of why there is no spending. Infill days/dates (as implied by front of diary) and ACCEPT if explanation given. REFER If no explanation. If no, check next question below.
Are there spending entries throughout the week (even if some days have zero spending) or clear indication of why days had zero spending (e.g. something written on the notes page or a diary page crossed through)?	If yes, infill days/dates (as implied by front of diary) and ACCEPT. If no, check next question below.
Is there a 'suspicious' pattern of spending entries that suggests the diary is incomplete, e.g. the 1 st couple of days have entries, and the rest are blank?	IF yes or in doubt, REFER If no, infill days/dates (as implied by front of diary) , ACCEPT

5. Dates and days are written in but they are inconsistent with each other (e.g. student writes in Monday 11th March and it should be Monday 10th).		
	Based on the DAY information given, has each different DAY of the week/weekend been written in, and there are NO duplicate or missing days? (We think it's easier to get a date wrong than day.)	If yes, check next question below. If no, REJECT
	Is the diary completely blank, i.e. there are NO spending entries on any of the days?	If yes, check notes for any indication of why there is no spending. Correct the DATES (not the days) and ACCEPT if explanation given. REFER If no explanation. If no, check next question below.
	Are there spending entries throughout the week (even if some days have zero spending) or clear indication of why days had zero spending (e.g. something written on the notes page or a diary page crossed through)?	If yes, correct the DATES (not the days) and ACCEPT. If no, check next question below.
	Is there a 'suspicious' pattern of spending entries that suggests the diary is incomplete, e.g. the 1 st couple of days have entries, and the rest are blank?	IF yes or in doubt, REFER If no, correct the DATES (not the days) and ACCEPT

6. Some dates and/or days are written in but others are missing	
Looking at the days/dates where information is given, do these day/date entries consistent with the diary being completed for 7 consecutive days?	<p>If yes, check next question below. For example, would be “yes” if student writes in Mon 17th, Tues 18th, blank, blank, Fri 22nd, blank, Sun 24th. (The missing days could correspond to the Wed, Thurs and Sat of that week.)</p> <p>If no, REFER For example, would be “no” if student writes in Mon 17th, Wed 19th, Thurs 20th, Sun 24th, blank, blank, blank.</p>
Is the diary completely blank, i.e. there are NO spending entries on any of the days?	<p>If yes, check notes for any indication of why there is no spending. Fill in the missing days/dates and ACCEPT if explanation given. REFER If no explanation.</p> <p>If no, check next question below.</p>
Are there spending entries throughout the week (even if some days have zero spending) or clear indication of why days had zero spending (e.g. something written on the notes page or a diary page crossed through)?	<p>If yes, fill in the missing days/dates and ACCEPT.</p> <p>If no, check next question below.</p>
Is there a ‘suspicious’ pattern of spending entries that suggests the diary is incomplete? For example, the 1 st couple of days have entries, and the rest are blank, particularly where the missing day/date information is also for these last blank days.	<p>IF yes or in doubt, REFER</p> <p>If no, fill in the missing day/dates and ACCEPT</p>
7. Any other day/date problem...	
	PLEASE REFER!!

APPENDIX D DATASET DOCUMENTATION- DERIVED VARIABLES AND MAIN BREAK VARIABLES

Student Income and Expenditure Survey 2007/8

A comprehensive overview of the income, expenditure (including diary) and borrowing derived variables. All are monetary amounts and shown in pounds. The computation of each derived variable is shown to the level of individual questionnaire/diary items. Adjustments will be made at analysis for students with joint financial responsibility. Variables that will be adjusted for joint financial responsibility are indicated by shading in section 1.

INCOME, EXPENDITURE AND BORROWING DERIVED VARIABLES.

Overall	Category	Type	Questionnaire	Diary
Income [XINCOME]	Family & friends [XFAMILY]	Contributions from parents [XPARENTS]	DTFAM3 (actual parental contribution towards tuition fees for dependent students) DTFWHO/DTFWHAM (any more parental contribution to fees for dependent students) ITFWHO/ITFWHAM (parental contribution to fees for independent students) CRSOTH/CRSAM2 (parental contribution to fees for PT students) RENTWHOP/RENTAMP/RENTWHOF/RENTAMF (contributions towards rent from parents) LIVWHOP/LIVAMP/LIVWHOF/LIVAMF (contributions towards living costs and bills from parents) GIFWHOP/GIFAMP/GIFWHOF/GIFAMF (gifts of money from parents)	
		Contributions from other relatives [XRELS]	DTFWHO/DTFWHAM (contribution to tuition fees from other relations for dependent students) ITFWHO/ITFWHAM (contribution to tuition fees from other relations for independent students) RENTWHOP/RENTAMP/RENTWHOF/RENTAMF (contributions towards rent from other relatives) LIVWHOP/LIVAMP/LIVWHOF/LIVAMF (contributions towards living costs and bills from other relatives) GIFWHOP/GIFAMP/GIFWHOF/GIFAMF (gifts of money from other relatives)	
		Contributions from non-relatives [XNON]	RENTWHOP/RENTAMP/RENTWHOF/RENTAMF (contributions towards rent from non-relatives) LIVWHOP/LIVAMP/LIVWHOF/LIVAMF (contributions towards living costs and bills from non-relatives) GIFWHOP/GIFAMP/GIFWHOF/GIFAMF (gifts of money from non-relatives)	

Overall	Category	Type	Questionnaire	Diary
		Gifts in kind [XGIFTS]	CT9/CT10 (payment of council tax on student's behalf) BOOK6/BOOK8 (gifts of books, workbooks etc) COMPI/COMPK (gift of a computer) EQU6/EQU8 (gift of special equipment needed for course) GIFTPAM/GIFTAM (gifts in kind received from anyone)	
		Gifts of money from partner [XPARTNER]	DTFWHO/DTFWHAM (contribution to tuition fees from a partner for dependent students) ITFWHO/ITFWHAM (contribution to tuition fees from a partner for independent students) CRSOTH/CRSAM2 (partner's contribution to fees for PT students)	
		Share of partner's income [XSHARE] ¹⁶	XPARTINC: PARAM/PARNET1/PARPER1 (partner's income, exact figure) PARAM2/PARNET2 (partner's income, banded figure)	
	Main sources of student support [XMSTUD] NB. included maintenance grants in 1998/9	Student Loan for Fees [XFLOAN]	FLAM1/FLAM1PER	
		Student Loan for Maintenance [XMLOAN]	LAM1/LAM1PER (Basic Student Loan for Maintenance) LWEEKS3/LWEEKS4 (Extra weeks allowances)	
		Maintenance Grant [XMNTG]	MGP1/MGAM/MGP2	

¹⁶ XSHARE is derived as follows:

$XPARTINC - (2 \times XPARTNER) - (XMSTUD + XOSTUD + XWORKXV + XBENS + XOTHINC + XPARNTS + XRELS + XNON + XGIFTS)$

Overall	Category	Type	Questionnaire	Diary
		Special Support Grant [XSSG]	SSGP1/SSGAM/SSGP2	
		Access to Learning Funds/ Financial Contingency Funds [XACCESS]	ACC1/ACC2/ACC3 (Access to Learning Fund in England) WACC1/WACC2/WACC3 (Financial Contingency Funds in Wales)	
		Higher Education Grant [XHEG]	HEGP1/HEGAM/HEGP2 (Higher Education Grant)	
		Course Grant [XCUGR]	CRSGAM (Course Grant for PT students)	
		Tuition Fee support [XFEE]	CRSAM (Amount of Grant for Fees received by PT students) DTWTFG/DTWTFGA (Amount of Grant for Fees received by FT dependent students) ITWTFG/ITWTFGA (Amount of Grant for Fees received by FT independent students)	
	Other student support [XOSTUD] NB Tax relief is no longer included in this	Child related support [XCHSUP]	CHCP1/CHCAM/CHCP2 (Childcare Grant) PLAP1/PLAAM/PLAP2 (Parents' Learning allowance)	
		Adult Dependants' Grant [XDEP]	ADGP1/ADGAM/ADGP2 (Adult Dependants Grant)	

Overall	Category	Type	Questionnaire	Diary
		Teaching related support [XTEACH]	EITTP1/EITTAM/EITTP2 (Training Bursary in England) SHORP1/SHORAM/SHORP2 (Secondary Shortage Subject Scheme in England) WITTP1/WITTAM/WITTP2 (Training Grant in Wales) TTRSP1/TTRSAM/TTRSP2 (Teacher Training Recruitment Scheme in Wales) WMISP1/WMISAM/WMISP2 (Welsh Medium Supplement in Wales) WITCP1/WITCAM/WITCP2 (Teaching Grant in Wales)	
		NHS related support [XNHS]	NHSB1/NHSB2 (NHS Bursary) LNHSXW2/LNHSXW3/LNHSXW4 (extra weeks allowances) NHSBA1/NHSBA2/NHSBA3 (additional allowances alongside the bursary) NHSL2 (Student Loan for NHS students)	
		Disabled student allowances [XDISAB]	EQU1/EQUAM/EQU2 (Specialist equipment allowance) HELP1/HELAM/HELP2 (Non-medical helpers allowance) GENP1/GENAM./GENP2 (General allowance) DTRP1/DTRAM/DTRP2 (DSA extra travel allowance) XDSAB2AM (other disability allowances/payments/items not adequately covered in qre)	
		Career Development Loans [XCDL]	CDLAM/CDLP1/CDLP2/CDLP3 (Career Development Loan)	

Overall	Category	Type	Questionnaire	Diary
		Employer support [XEMPL]	DTFWHO/DTFWHAM (contribution to tuition fees from an employer for dependent students) ITFWHO/ITFWHAM (contribution to tuition fees from an employer for independent students) EMPLP1/EMPLAM/EMPLP2 (financial support from employers, not for tuition fees) CRSOTH/CRSAM2 (employers contribution to fees for PT students)	
		Support from student's university or college [XUNICL]	ADFSSAM (Additional Fee Support Scheme) [XAFSS] DTFWHO/DTFWHAM (contribution to tuition fees from university or college for dependent students) ITFWHO/ITFWHAM (contribution to tuition fees from university or college for independent students) EUCBRS1/EUCBAM/EUCBRS2 (University/College Bursaries in England) [XEBS] WUCBRS1/WUCBAM/WUCBRS2 (University/College Bursaries in Wales, Welsh Bursary Scheme) [XWBS] USCOL1/UCSCOLAM/UCSCOL2 (University/College Scholarships) [XSCOL]	
		Charities [XCHAR]	DTFWHO/DFWHAM (contribution to tuition fees from a trust for dependent students) ITFWHO/IFWHAM (contribution to tuition fees from a trust for independent students)	

Overall	Category	Type	Questionnaire	Diary
		Other (e.g. EU program/ Care Leavers, Travel) [XOTHSTUD]	DTFWHO/DTFWHAM (contribution to tuition fees from an “other” source for dependent students) ITFWHO/ITFWHAM (contribution to tuition fees from an “other” source for independent students) CRSOTH/CRSAM2 (contribution to fees from an “other” source for PT students) TRAVP1/TRAVAM/TRAVP2 (extra travel costs) SAFAM (Student Assistance fund for OU students) CFAM (Crowther fund for OU students) COMPHU1/COMPJU1 (computer from uni/college). OUCOMAM (Computer/Internet Grant for OU students) WALP1/WALAM (Welsh Assembly Learning Grant) ERASAM (Socrates-Erasmus funding) TRSTAM (Educational trust or charities funding) OTHAM(Any “other” grants/allowances)	
	Paid work [XWORKXV^{17]}	Permanent/continuous job [XPJOB]	JOBAMT/JOBPT (earnings from job generally or in term times) JOBAMV/JOBPV (earnings from job in holidays- (not summer vacation))	
		Other (non continuous) work [XOTHJXV^{18]}	JSAL/JSALP (earnings from “other” jobs)	
	Social security benefits [XBENS]	Social security benefits [XBENS]	BEN1/BEN2/BENST/BENCONT/BENP/BENF/BENAM (amount of benefits received) CT5/CT7 (council tax benefit)	

¹⁷ XWORKXV refers to work excluding summer vacation and was included in XINCOME. For work including summer vacation use variable XWORK and for income including summer vacation work use XINCWSV.

¹⁸ XOTHJXV refers to ‘other’ work excluding summer vacation and was included in XINCOME. For ‘other’ work including summer vacation use variable XOTHJOB and for income including summer vacation work use XINCWSV.

Overall	Category	Type	Questionnaire	Diary
	Other income [XOTHINC]	Miscellaneous [XOTHINC]	<p>MAINAM1/MAINAM2 (maintenance payments received)</p> <p>MISCAM (miscellaneous income)</p> <p>HOUS7 (rent received from lodger/sharers)</p> <p>BOOK10/BOOK12 (sale of books, workbooks etc)</p> <p>COMPM (sale of a computer)</p> <p>EQUP10/EQUP12 (sale of special equipment needed for the course)</p> <p>SOLD/SOLDA (sale of various items)</p> <p>RENTWHOP/RENTAMP/RENTWHOF/RENTAMF (contributions towards rent from an organisation)</p> <p>LIVWHOP/LIVAMP/LIVWHOF/LIVAMF (contributions towards living costs and bills from an organisation)</p> <p>GIFWHOP/GIFAMP/GIFWHOF/GIFAMF (gifts of money from organisations)</p>	
Expenditure [XSPEND]	Living [XLIVING]	Food [XFOOD]	N/a	<p>Food – meals/snacks from cafes, pubs, restaurants, shops etc, outside the home [XDYFDA]</p> <p>Non-alcoholic drinks outside the home [XDYFDC]</p> <p>Food and drink to consume at home [XDYHOUA]</p> <p>Other food and drink (non-alcoholic) [XDYFDX]</p>

Overall	Category	Type	Questionnaire	Diary
		Personal [XPERST]	<p>TELA/TELB/TELC (landline telephone costs)</p> <p>MOBA/MOBB/MOBC (mobile phone costs)</p> <p>SPEN/SPENA/SPENF/SPENAF (spending on certain items in these questions)</p> <p>→ XPERS</p>	<p>Cigarettes & tobacco [XDYPERC]</p> <p>Clothes, shoes, accessories [XDYPERA]</p> <p>CDs, music, DVDs videos etc [XDYPERB]</p> <p>Newspapers, magazines, books, stationery etc [XDYPERD]</p> <p>Gifts & cards [XDYPERE]</p> <p>Prescriptions & other medicines [XDYPERF]</p> <p>Toiletries [XDYPERG]</p> <p>Other personal expenditure not covered in the qre/diary [XDYPERX]</p> <p>→ XPERSD</p>
		Entertainment [XENTERT]	<p>SPEN/SPENA/SPENF/SPENAF (spending on certain items in these questions)</p> <p>→ XENTER</p>	<p>Cinema, theatre & concerts [XDYLIFA]</p> <p>Entry to nightclubs, discos etc [XDYLIFB]</p> <p>Sports, hobbies, clubs & societies [XDYLIFC]</p> <p>Religious activities [XDYLIFD]</p> <p>National lottery or betting [XDYLIFE]</p> <p>Other entertainment [No Variable As D1liff Etc Were Deleted After Editing]</p> <p>Alcohol consumed outside the home [XDYFDB]</p> <p>Alcohol consumed inside the home [XDYHOUB]</p> <p>→ XENTERD</p>

Overall	Category	Type	Questionnaire	Diary
		Household goods [XHHGOODT]	SPEN/SPENA/SPENF/SPENAF (spending on certain items in these questions) → XHHGOOD	Household goods, cleaning, pet food etc [XDYHOUC] Laundry or dry cleaning [XDYHOUE] Servicing or repairs to hh equipment [XDYHOUD] Payments into a kitty/common pool [XDYHOUF] Other household items not covered in qre/diary [XDYHOUX] → XHHGOODD
		Travel [XLIVTRAT]	VCOST (vehicle maintenance) FAMPAM/FAMFAM (travel between family home and uni/college) HOLS1/HOLS2 (cost of holidays) SPEN/SPENA/SPENF/SPENAF (spending on certain items in these questions) → XLIVTRAV	Fares paid for leisure travel [XDYTRB + XDYTRX] Parking paid for leisure travel [XDYTRF] Fares paid to/from school/nursery [XDYTRC] Petrol for a car van, motorbike or scooter (NB this need to be minus the cost recorded at PETR and already included in XPARTRAV) [XDYPETR] → XLIVTRAD
		Other living costs [XOTHLIVT]	MAINT2/MAINTAM (maintenance for former partner/children) SPEN/SPENA/SPENF/SPENAF (spending on certain items in these questions) OTHPAYAM (misc other payments) → XOTHLIV	Other costs not already covered in the main qre or diary [XDYLIFX] Other specific one-off payments not covered in qre [XDYX1] Other specific regular payments not covered in qre [XDYX2] → XOTHLIVD

Overall	Category	Type	Questionnaire	Diary
	Housing [XHOUSE]	Rent [XRENT]	HOUS5 (mortgage if lived in one place) HOUS8 (rent if lived in one place) HOUSB (rent/mortgage in first term) HOUSD/HOUSF (rent/mortgage in first vacation/second vacation) HOUSL/HOUSN (rent/mortgage in second term/third term) HB1/HB4/HB6 (housing benefit if relevant)	
		Retainer [XRETAINE]	HOUSI/HOUSJ (retainer in first vacation/second vacation) HOUSQ/HOUSR (retainer in last long vacation) HOUSV (mortgage over last long vacation)	
		Other (e.g. household bills) [XOTHHOUS]	CT2/CT3/CT6/CT11 (council tax payments) BILLA/BILLB/BILLC (household bill payments) SPEN/SPENA/SPENF/SPENAF (spending on certain items in these questions)	
	Participation [XPARTIC]	Books and equipment [XBOOKS]	BOOK1/BOOK2 (books, workbooks, papers, pamphlets) PHOT1/PHOT1AM/PHOT2/PHOT2AM (photocopying, stationery etc) COMPF/COMPG (computer costs) EQU3/EQU4 (special equipment for the course) COLFAM (other course expenditure e.g. amenity fees) OUAMFAM (amenity fees- OU students)	
		Travel and study related childcare [XPARTRAV]	TRCOST (travel to uni/college) PETR (petrol to uni/college) TRIP5 (course/study related trips) CHC1ST/CHC2ST/CHC3ST (childcare that are related to course/study)	

Overall	Category	Type	Questionnaire	Diary
		Cost of fees [XFEECON]	CRSFEE (PT and new system) 1225 if old system NHS Students- 1225 if old system, 3070 if new system (divided by 2 if PT student).	
	Children [XCHILD]	All spending on children [XCHILD]	CH1 to CH13 (spending on children) CHC1ST/CHC2ST/CHC3ST (childcare costs not related to course/study)	
Total borrowing [XBORR]	Borrowing [XBORR]	Commercial Credit [XCREDIT]	COMDT (commercial loan balances at the end of the year) CCENDAM (credit card balances at the end of the year) HPAC3 (HP agreement level owed at the end of the year)	
		Overdraft [XOD]	ODE (overdraft at the end of the year)	
		Arrears [XARR]	ARRFAM (arrears at the end of the year)	
		Informal Loans [XINFLOAN]	INFLFAM (informal loans owed at end of year)	
		Career Development Loan [XCDL]	CDLAM/CDLP1/CDLP2/CDLP3 (Career Development Loan)	
		Outstanding Student Loan debt [XSTUDEBT]	LAM1/LAM1PER (amount of Student Loan for Maintenance this year) FLAM1/FLAM1PER (amount of Student Loan for Fees this year) OLDLAM1-OLDLAM2 (amount owing on previous Student Loans)	
		Outstanding Access to Learning funds (if to be repaid) [XACCDEBT]	ACC1/ACC2/ACC3 (Access to learning Fund in England) WACC1/WACC2/WACC3 (Financial Contingency Fund in Wales)	
Total savings [XSAVE]19	Savings [XSAVE]	Savings [XSAVE]	SAVEE (savings at the end of the year) Note: value for XSAVE was adjusted for those who were married or had joint financial responsibility or a joint bank account.	

¹⁹ Other derived variables relating to savings include XSAVEL (savings at the end of the last academic year) and XSAVEB (savings at the start of the academic year).

Section 2: Main break variables in the SIES dataset

Break variable	Description
AGEGR1	Age group at start of academic year (3 groups)
AGEGR2	Age group on entry (3 groups) NB: changed from 2004/05 variable
AGEGRPT	Age group for part-time students (4 groups)
AGEHESA	Age group on entry (2 groups)
XETH2	Ethnicity – white/BME
XETH4	Ethnicity (4 groups)
FAMILY	Family situation
ONSYS	Student funding system (old/new)
SEX	Gender of student
XTENUR1	Tenure (full classification),
XTENUR2	Tenure (shortened classification)
XTENUR3	Tenure (shortened classification for part-time students)
XLIVPAR	Whether or not student lives with parents in term-time
XTENUR07	Tenure (revised 07/08 tenure with university accommodation separated out)
INSTLOC	Institution location
INSTLDM	Institution location and domicile of student
LOND	Whether lives in London or elsewhere (NB. only asked of Eng domicile)
MARITAL	Marital status (full classification)
MARSTAT	Marital status (shortened classification)
STTYPE	Mode of study (FT, PT, OU),
FTPDOM	Mode of study and domicile
FTPDU	Mode of study (FT, PT inc. OU)
NSCLASTR	Socio-economic classification (collapsed) (NB- excludes OU students; do not use NSCLAST3)
SUBALL	Subject of study (grouped subjects)
XPARINCM	Parental income (NB- asked of dependent students only; high number of refusals/don't know).
XQUAL	Qualification working towards (3 groups)
STAT2	Student status (dependent/independent) NB: Do not use STAT
SUBMED	Subject of study (medicine & dentistry vs other)
HEPAR2	Whether parents attended HE
XYEAR1	Year of Study (NB: 1 st year category excludes students on 1 year courses who are categorised as final year)

Section 3: Sampling and technical variables

Break variable	Description
WT_FINAL*	Weighting variable
PSUVAR*	Primary sampling unit
STRATVAR*	Stratification variable
DVFLAG1	Indicator of imputation for missing fees information (subset of full-time old system students)
IDTFFAM..	Imputed fees questions
IIFLOANTOT	
CLEAN	Indicator of whether data adjustment (cleaning) applied
GROUP....	Type of data cleaning applied
Variables	

* For use in SPSS Complex Samples modules.

Section 4: Adjusting data for joint financial responsibility

The adjustments for joint financial responsibility at SIES 2007/08 follow the precedent set at 2004/05 and the same adjustments were made to the current dataset. These adjustments were agreed with DfES for the 2004/05 SIES report.

In the questionnaire and diary students were asked to give answers about their individual income and expenditure whenever this was feasible. However, for some items it was not feasible to record an individual amount when a student lived with a partner (for example, mortgage payments, social security benefits, and household spending on food and entertainment). Therefore, joint amounts were collected and these were adjusted in analysis.

The adjustment was made where students were married or had joint financial responsibility with a partner (defined as sharing responsibility for housing and other essential expenditure or having a joint bank or building society account). The method of adjustment was to divide the stated expenditure by half. A similar adjustment had been carried out in previous years of SIES (prior to the 2004/05 study).

Social security benefits and miscellaneous income from maintenance payments, rent from lodgers and sales of books and equipment were treated as joint income. Shared borrowings and savings were also treated as joint. Among items of expenditure, the items treated as joint expenditure were food and drink to consume at home, landline and mobile telephone costs, the costs of glasses, contact lenses, dental treatment, computer equipment, televisions and hi-fi equipment, furniture, household goods and appliances, holidays, and the costs of vehicles and their maintenance.

In some cases, this adjustment may result in negative values for certain derived variables. Take the example of XShare (which records the student's share of their partner's income and itself feeds into the broader category 'income from family and friends'). If a partner has a higher income than the student, XShare will equal half of the surplus. However, if a student's income is higher than their partner's, XShare will equal half of the difference and will be a negative value, indicating that the student is the main breadwinner and is supporting the partner. If XShare is a negative value and is not outweighed by contributions from other family/ friends, then the average contribution from family/friends overall will remain a negative amount. Negative values are rare and usually only occur among (male) part-time students.

APPENDIX E FIELDWORK QUESTIONNAIRE

The following documents appear in this appendix:

- The full CAPI interview questionnaire
- Examples of CAPI showcards
- Diary of Spending

Student Income and Expenditure Survey 2007/8

Questionnaire draft-Mainstage version

Prepared for the Department for Innovation, Universities and Skills
and Welsh Assembly Government

December 2007

P2719

Questions are in the following format:

{Who is asked the question}

{A reference to a previous SIES question no. if the question is similar or replicated}

QUESTIONNAME

The question text that will be read out by the interviewer in lower case letters. The interviewers will read to the final question mark?

ANY NOTES TO INTERVIEWERS THAT ARE NOT TO BE READ OUT ARE IN UPPER CASE LETTERS.

Type of answer including ranges if the answer is a number

Instructions about any disallowed answer codes (e.g. if don't know is not accepted)

{Instructions about any check that will come up regarding the answers given}

For example:

{Ask all}

{1998 2.3}

MARITAL

Are you ... READ OUT...

INTERVIEWER, IF MORE THAN ONE APPLIES CODE THE FIRST THAT APPLIES.

Married and living with a husband/wife

Living permanently with a partner

Single, never married

Divorced or separated

Widowed?

No don't know or refusal

INTRODUCTION AND BACKGROUND

NB

Data fed into the questionnaire

The following data will be collected by NatCen and fed forward into the CAPI questionnaire program:

- the name of college/institution attended
- the term dates of their institution if they are college/university based
- {possibly: the level of fees for old and new system students at their institution}
- if they are an Open University (OU) student
- if they are a full- or part-time student as stated on the opt-in questionnaire
- any relevant contact details as stated on the opt-in questionnaire

Academic years – university/college based and Open University students

Some questions currently read “since the start of the academic year, that is DATE”. This is suitable for university/college based students. However, for OU students this will be substituted by “since the start of August 2007” as this is the start of the OU academic year.

When questions read “until the end of the academic year, that is until DATE” for OU students this will be substituted by “until the end of July 2008” as this is the end of the OU academic year.

Don't knows

With the exception of some key screening questions, students may respond to a question with ‘don't know’ or refuse to give an answer. However, on all questions regarding monetary amounts interviewers are instructed to encourage the student to give their best estimate. If interviewers do enter ‘don't know’ as an answer, a check will prompt the interviewer to reaffirm the importance of giving an answer if at all possible. This will ensure that minimal data is missing.

Derived variables

Key derived variables related to income, expenditure and borrowing over the academic year are derived in the CAPI questionnaire as the student answers questions. How the data collected in individual questions are used in the derived variables are outlined under the relevant questions in this document.

Time periods

The majority of answers relating to amounts of money may be answered relating to a variety of different time periods eg. per month or per week (for ease of answering by the student). Therefore the amounts of money given must be multiplied up to create a measure over the academic year. When identifying the multipliers that should be used in relation to the time period referred to, the assumption is that the academic year for OU students runs from 01/08/2007 to 31/07/08 and for university based/college based students the academic years runs from 04/10/07 to 01/07/2008. Therefore the following multipliers will be used if an amount of money spend or received covers each time period:

Time period	University/college based	Open University
Week	X 39	X 52
4 weeks	X 10	X13
Month	X 9	X 12
Vacation	X 2 (if Christmas) X 1 (if Summer vacation)	N/a
Term	X 3	N/a
Quarter (3 months)	X 3	X 4
Academic year/course	X 1	X 1
Year	X 1	X 1

NB if a student does not give a specific time period the multiplier will be x 1.

Joint financial responsibility

If a student is married, or, lives with a partner with whom he/she shares financial responsibility or has a joint account, the student's *partner/spouse's* income and expenditure is asked about in relevant questions.

In order to take their joint financial situation into account, the student's expenditure and that of their spouse/partner will be totalled to find 'household' figures in the derived variables in the questionnaire. The figures will then be divided by two in analysis for these students to show their share of expenditure.

Share of income is calculated by subtracting the student's income from their spouse's/partner's then dividing by two. If the student has coded the partner as having contributed to specific payments elsewhere in the questionnaire this is taken into account. The resulting sum is then added to the student's income to get their total income. Other miscellaneous income that is asked about jointly for the student and partner (e.g. maintenance payments) is divided by two and counted in the relevant categories.

1.1 Screening questions and course details

{Ask all}

Intro

Before I begin, I just need to ask a few questions to check that you are eligible to take part in this survey.

Continue

{Ask all, except OU students}

UNI

Firstly, are you currently registered and attending courses at (NAME OF INSTITUTION)?

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes

No

{Don't know or refusal are not allowed}

{Ask all, except OU students. Ask those who are no longer attending the university/FE college they were identified at}

UNIDIF1

Are you registered and attending a higher education course at another university or FE college?

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes

No (CLOSE INTERVIEW)

{Don't know or refusal are not allowed}

{Ask all, except OU students. Ask those who are no longer attending the university/FE college they were identified at if they are attending a different university/FE college}

UNIDIF2

What is the name of the university or FE college you are attending?

WRITE IN ANSWER VERBATIM

Open answer type

{Ask all OU students}

OUCOU

Are you currently registered and still studying for a course with the Open University?

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes

No (CLOSE INTERVIEW)

{Don't know or refusal are not allowed}

{Ask all, except OU students}

FTPT

Is your course full-time or part-time?

INTERVIEWER CODE SANDWICH STUDENTS AS 'Full-time'

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Full-time

Part-time

{Don't know or refusal are not allowed}

{Check if student status is different from information in the sample file. "The information taken from the form you recently filled in says you are (full/part)-time, but I have recorded that you are (full/part)-time. Is this correct?"}

{Ask all, except OU students, who say they are part-time}

PT2

Does your course last at least 1 academic year and is it equivalent to 50% or more of a full-course?

INTERVIEWER IF STUDENT IS NOT SURE, PROMPT: If you are on a part-time course worth 50% of a full-time course, you would expect to finish the course in no more than twice the time it would take a full-time student to do the course. Part-time students may apply to their , or Local Authority (or Student Loans Company), for a grant for Fees of £765 towards tuition fees and a Course Grant of £250, although not all will be awarded this. One year of a part-time course worth 50% of a full-time course is equivalent to 60 credits. Welsh-domiciled part-time students can also get money from the Assembly Learning Grants.

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes – are on more than a 50% equivalent course

Yes – are on about 50% of a full-time course

No (CLOSE INTERVIEW)

{Ask part-time students and OU students}

PTWHY

SHOWCARD A

Why did you choose to study part-time (with the OU)?

CODE ALL THAT APPLY

Only option available / no suitable full-time course available

Had a full-time job / wanted to continue working

Have family commitments / caring for household member

Had to study part-time to avoid reductions in social security benefits/allowances

Could not afford to study full-time

Because of the new student funding regime

Did not have entry qualifications to study full-time course

Other reason (Please specify)

{Ask part-time students who gave an "other" reason for studying part-time}

PTWHYSP

WRITE IN REASON VERBATI M

Open type answer

New questions to determine whether new or old system student

{Ask all (except OU students?)}

CRSTRT

Did you start your first year of Higher Education study...READ OUT...

CODE FIRST TO APPLY.

IF TRANSFERRED FROM ANOTHER COURSE, PLEASE CODE YEAR ORIGINAL COURSE STARTED.

IF DOING AN 'END-ON' DEGREE AFTER A FOUNDATION DEGREE, CODE YEAR FOUNDATION DEGREE STARTED.

On or after 1st September 2007,
or before September 2007?

{Ask those starting earlier than 1st September 2007 (except OU students?)}

CRSTRT2

(Can I check) Did you start your first year of Higher Education study...READ OUT...

CODE FIRST TO APPLY.

IF TRANSFERRED FROM ANOTHER COURSE, PLEASE CODE YEAR ORIGINAL COURSE STARTED.

IF DOING AN 'END-ON' DEGREE AFTER A FOUNDATION DEGREE, CODE YEAR FOUNDATION DEGREE STARTED.

On or after 1st September 2006,
or before September 2006?

New question to determine whether new or old system student

{Ask all starting on or after 1st September 2006 at CRSTRT2 (except OU students?)}

CRDEFER

May I check, was this a deferred place or not?

Yes, was deferred place

No, was not deferred place

{ NOTE: Program will derive old/new system student indicator. Old system students will be defined as those starting their courses before September 2006 or taking up a deferred place in September 2006. New system students will be defined as those starting their courses on or after 1st September 2007, or between 1st September 2006 and 1st September 2007 as long as this is not a deferred place.}

{Ask all}

YRTOTAL

How many years in total is your current course or programme?

CODE TO NEAREST YEAR. ROUND HALF YEARS UPWARDS.

INTERVIEWER IF NEEDED: This is asking about the total length of time it takes you to do the course, not how long you have left on the course.

Numeric answer: Range 1 to 12

{Check if course lasts more than 6 years "This is a long course, can I check that you said it will last for X years?"}

{Ask non- OU students}

YRNOWC

What year of your course are you *currently* studying. Is it the first year, the second etc?

INTERVIEWER: for part-time students, please code the number of years they have been studying.

INTERVIEWER: for sandwich students, please include their placement year as a year of study.

INTERVIEWER: If student has had to repeat any year(s) of their course, please include these as years of study and make a note that you have done this.

Year 1

Year 2

Year 3

Year 4

Year 5

Year 6

Year 7

Year 8 or more

{Check for compatibility of YRNOWC and CRSTRT/CRSTRT2:

- IF CRSTRT= on or after Sept 07 and year of study >1: As you started your course on or after the 1st September 2007 we would expect you to be in your first year of study. Can I check what I have recorded?
- IF CRSTRT2= on or after Sept 06 and year of study >2: As you started your course on or after the 1st September 2006 we would expect you to be in your second year of study. Can I check what I have recorded?
- IF CRSTRT2= before Sept 06 and year of study <2: As you started your course before 1st September 2006 we would expect you to be in your third year of study or later. Can I check what I have recorded?

{Ask OU students}

YRNOWO

How many years have you been studying with the Open University?

- 1 year
- 2 Years
- 3 Years
- 4 Years
- 5 Years
- 6 Years
- 7 Years
- 8 Years or more

{Ask those studying towards a first degree (BA, BSc, Bed or BA Ed) and on a 2 year course}

FAST

You are studying for a degree in 2 years. Are you on a 'fast-track' degree course?

- Yes
- No

{Ask all (except OU students)}

SYSCHK

You may be aware that the fees charged to students and the types of financial support available changed in 2006. In connection with this, from what you have told us, we think you are {textfill: old/new} system student.

Is this right?

INTERVIEWER IF NEEDED: {IF CONSIDERED TO BE OLD SYSTEM

STUDENT: Textfill: By old system student we mean that you applied for the package of student support available before the 1st of September 2006.}

{IF CONSIDERED TO BE OLD SYSTEM STUDENT AND DEFERRED

PLACEMENT (at CRDEFER): Textfill: By old system student we mean that you applied for the package of student support available before the 1st of September 2006. This applies to you even if you did not start your course until after the 1st September 2006}

{IF CONSIDERED TO BE NEW SYSTEM STUDENT: Textfill: By new system student we mean that you applied for the package of student support available on or after the 1st of September 2006.}

- Yes
- No
- Don't know

{If no, change old/new system indicator as appropriate – if yes or don't know, retain programme-derived old/new system indicator}

{Ask full-time students}

SAND

Can I check, is your course a sandwich course?

INTERVIEWER IF NEEDED: A sandwich course is one which combines academic study with a period of time spent working in industry e.g. a year out of study on a work placement.

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes

No

{Don't know or refusal are not allowed}

{Ask full-time students if they are on a sandwich course}

SANDJOB

Have you earned, or will you earn, any money at all from a *paid* placement for your sandwich course *during this academic year* that is between DATE and DATE?

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes (CLOSE INTERVIEW)

No

{Don't know or refusal are not allowed}

{Ask all (excluding OU students)}

SEMEST

Courses in universities and colleges are either run using three **terms** in an academic year, or using two **semesters** in the year. Later in the interview I will use the phrase 'term-time'. I will ask you questions about the **first term**: that is, the start of your academic year until the break for Christmas. I will also ask about the **second term**, that is the period of time after the Christmas break. I will give you dates as references on these types of questions.

Continue

{Ask all OU students}

OUREG

In which year did you first register with the OU?

ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Numeric: Range 1969 to 2007

{Don't know or refusal are not allowed}

{Ask all OU students}

OUNUM

How many Open University courses are you currently studying on or registered for?

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Numeric: Range 1 to 6

{Don't know or refusal are not allowed}

{Ask all OU students. Repeat for the number of courses the student is taking}

OUST

When does/did the (first/second etc) course start?

INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.

ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Datatype answer

{Don't know or refusal are not allowed}

{Ask all OU students. Repeat for the number of courses the student is taking}

OUF

When does/did the (first/second etc) course end?

INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.

ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Datatype answer

{Don't know or refusal are not allowed}

{Ask all OU students}

OUCRED

And can I also check, are you currently studying or registered for (a course or combination of courses) that (is/are) worth 60 or more credit points in total?

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes

No (CLOSE INTERVIEW)

{Don't know or refusal are not allowed}

{Ask all OU students}

OUPREV

Were you already studying with the Open University before July 2007?

Yes

No

{Ask all}

UKRES

Were you ordinarily resident in the United Kingdom for the three years before the start of your course. We mean was the United Kingdom your home even if you were travelling or working abroad some of this time?

INTERVIEWER:

STUDENTS FROM THE CHANNEL ISLANDS OR ISLE OF MAN CODE

'Yes'.

OVERSEAS STUDENTS OR EUROPEAN STUDENTS CODE 'No'.

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Yes – ordinarily resident

No (CLOSE INTERVIEW)

{Don't know or refusal are not allowed}

{Ask all}

UKDOMP

Immediately before you started the course, in which country were you living in the United Kingdom. Again we mean which country was your home even if you were travelling or working abroad over the summer. Was it...READ OUT...

INTERVIEWER: IF STUDENT UNSURE ASK WHERE GRANT RECEIVED FROM/WHERE TUITION FEES PAID FROM

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

England

Wales

Scotland (CLOSE INTERVIEW)

Northern Ireland (CLOSE INTERVIEW)

Or the British Islands e.g. the Channel Islands or the Isle of Man?

{Don't know or refusal are not allowed}

{Ask if they attend an English University/college or are OU students}

LOND

ASK OR CODE:

(IF NOT OU In term-time) Do you live in London or elsewhere in England?

London

Elsewhere

{Ask all}

QUAL

SHOWCARD B

I would like to ask you about the qualification you are studying for. From this card, what are you studying for?

INTERVIEWER IF NEEDED: University Foundation Certificate is not HE level.

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Bachelor degree e.g. any BA, BSc, BEd or BA Ed

Foundation degree

PGCE / Initial Teacher Training

Dip HE (Diploma of Higher Education)

HND (Higher National Diploma)

HNC (Higher National Certificate)

Certificate of Higher Education

University Certificate

University Diploma

Other, e.g. any postgraduate course other than PGCE, any qualification below

University Certificate/Diploma (CLOSE INTERVIEW)

{Don't know or refusal are not allowed}

{Ask all}

SUBJECT1

Is your main subject an arts or a science subject?

INTERVIEWER: IF THE STUDENT IS NOT SURE, ENCOURAGE THEM TO DECIDE AND ASK THEM TO THINK ABOUT THE QUALIFICATION THEY WILL RECEIVE E.G. BA OR BSc

INTERVIEWER: DON'T KNOW/REFUSALS ARE NOT ALLOWED AT THIS QUESTION.

Arts

Science

Spontaneous only: Combination of Arts and Science

No don't know or refusal

{Ask all}

SUBJECT2

SHOWCARD C

From the answers on this card how would you describe your *main* subject?

INTERVIEWER: IF NOT SURE WHAT TO CODE, ENTER UNSURE/OTHER THEN WRITE IN NAME OF DEPARTMENT.

INTERVIEWER IF NEEDED: Use F9 help-screen for more details on coding subjects.

USE F6 TO SCROLL TO SEE ALL CODES.

Medicine and Dentistry

Subjects allied to Medicine

Biological Sciences

Veterinary Science

Agriculture and related subjects

Physical Sciences (including Chemistry and Physics)

Mathematical Sciences

Computer Sciences

Engineering and Technology

Architecture, Building and Planning

Social Studies (including Economics, Politics and Geography)

Law

Business and Administrative Studies

Mass Communications and Documentation

Languages (including Classics)

Historical and Philosophical studies

Creative Arts and Design

Education

Combined

Unsure/other

{Ask if "other/unsure" is coded}

SUBJECT3

WRITE IN VERBATIM NAME OF COURSE OR DEPARTMENT

Open answer

{Ask those studying medicine/dentistry/subjects allied to health}

NHS1

Are you studying on an NHS funded health professional course?

Yes

No

{Ask those studying medicine/dentistry/subjects allied to health. All who are on an NHS funded course}

NHSBURS

Have you received, or do you expect to receive any money as an NHS

Bursary this academic year?

INTERVIEWER:

Medical and dental students on standard 5 or 6 year courses may be eligible for NHS Bursaries to help with tuition fees in their 5th and further years of study. They can also receive 50% of the full loan in these later years of study.

Yes

No

{Ask full-time students}

ABROAD1

Can I check, as part of your course do you have to attend an education institution outside the UK? INTERVIEWER IF NEEDED: By UK we mean England and Scotland and Wales and Northern Ireland

Yes

No

{Ask if ABROAD1=Yes}

ABROAD2

During this academic year that is between DATE and DATE, do you have to attend an education institution outside the UK for at least eight weeks continuously?

Yes

No

{Ask all students}

SLDEBT

Had you studied on another higher education course *previously*, before the course that you are studying for now?

INTERVIEWER: This includes study for bachelor and foundation degrees, PGCE and teacher training, Dip HE, HNCs, HNDs, Certificates of Higher Education and University Certificates and Diplomas.

INTERVIEWER: Please include higher education courses that were started but not completed.

Yes

No

1.2 Background

{Ask all}

DOB

Now I would like to ask you a few things about yourself and your household (IF NOT OU STUDENT in term-time).

What is your date of birth?

Datatype answer

{Check if student is younger than 18 or older than 30 "Can I just check I typed in your date of birth correctly?"}

{Ask all}

MARITAL

Are you ... READ OUT...

INTERVIEWER, IF MORE THAN ONE APPLIES, CODE THE FIRST THAT APPLIES.

Married and living with a husband/wife

Living with a partner

Single, never married

Divorced or separated

Widowed?

{Ask if student is married or lives with partner}

FINJ1

Do you share *joint* financial responsibility with your partner, for example by regularly sharing the costs of housing or other essential expenditure?

INTERVIEWER: DO NOT INCLUDE CASES WHERE THE STUDENT SHARES COSTS EQUALLY WITH A PARTNER AND OTHERS IN THE HOUSE.

Yes, share responsibility for housing or other essential expenditure

No

{Ask if student is married or lives with partner}

FINJ2

Do you have a joint account with a bank or building society with your spouse or partner?

Yes, have joint account

No

{Ask all}

SUPFIN

Would you say that you have supported yourself financially for a total of 3 years or more prior to the start of the first academic year of the course?

INTERVIEWER: Self-supporting would include being on benefits or being supported by a spouse/partner.

INTERVIEWER: The 3 years do not have to be consecutive.

Yes

No

{Ask all}

HHNUMB

Including yourself, how many people live in your household - by 'household' I mean people with whom you share your accommodation (IF NON-OU STUDENTS in term-time) *and* with whom you share some financial responsibilities, or people *for* whom you have financial or other responsibilities?

INTERVIEWER: If student has their own room in university/college halls of residence this should be considered a single household.

INTERVIEWER: Financial responsibilities could include rent and/or utility bills, but not sharing food/meals.

Numeric: Range 1 to 20

{Ask if there is more than one person in the household}

DEPAD

Do you live with any adults who depend on you financially?

Yes

No

{Ask if there is more than one person in the household}

CHILDHH

Do you have any children *of your own living with you* who are aged 16 or under, or in full-time education and aged 17 or 18?

INTERVIEWER: If a student lives away from home during the week, but lives with their child at the weekend, this is counted as living with the student. Do not include step-children as these are asked about separately.

Yes

No

{Ask if the student has children of their own living with them}

CHNO

How many?

Numeric: Range 1 to 15

{Ask if the student has children of their own living with them. Repeat for the number of children they have}

CHAGE

How old is the (first, second, third etc) child?

INTERVIEWER CODE AGE FOR EACH CHILD. CODE 0 IF THE CHILD IS UNDER 1 YEAR OF AGE.

Numeric: Range 0 to 18

{Ask all}

CHABS

Do you have any children of your own aged 16 or under, or in full-time education and aged 17 or 18, who *do not* live with you?

Yes

No

{Ask if shares joint financial responsibility with a spouse or partner}

PARTCH1

Does your spouse/partner have any children that you have not already told me about aged 16 or under, or in full-time education and aged 17 or 18, who live with you in your household?

Yes

No

{Ask if shares joint financial responsibility with a spouse or partner, and if partner has children of their own living with them}

PCHNO

How many?

Numeric: Range 1 to 15

{Ask if shares joint financial responsibility with a spouse or partner, and if partner has children of their own living with them. Repeat for the number of children they have}

PCHAGE

How old is the (first, second, third etc) child?

INTERVIEWER CODE AGE FOR EACH CHILD. CODE 0 IF THE CHILD IS UNDER 1 YEAR OF AGE.

Numeric: Range 0 to 18

{Ask if shares joint financial responsibility with a spouse or partner}

PARTCH2

Does your spouse/partner have any children aged 16 or under, or in full-time education and aged 17 or 18, who *do not* live with you in your household?

Yes

No

2 FEES

{NB students receiving NHS Bursaries from DoH/NHS Wales will not be asked questions in this section unless it is explicit in the routing of the questions}

{Ask all}

INTRO

SHOWCARD C.2 (ENGLAND)/SHOWCARD C.3 (WALES)

I would now like to ask some questions about **tuition fees** for your course and any financial support you get via the Local Authority (or Student Loans Company) (IF ON NHS COURSE: Department of Health or NHS Wales) (IF OU STUDENTS or through the OU) towards your fees. Please note I am not asking about any support **for maintenance or living costs** now – I will cover those later.

(IF FT or PT on ITT at English or Welsh institution: This card shows what fees can be charged and help that may be available to pay them. Please refer to it at any time if you need to.)

Continue

{Ask full-time students or part-time students on initial teacher training }

TUITAP

Have you made an application for support for tuition fees from the Local Authority (or Student Loans Company) (IF ON NHS COURSE: Department of Health or NHS Wales) for this academic year?

Yes

No

{Check if no: "Can I just check, this would mean that you have not applied for and do not expect to receive a Student Loan for Fees (FOR OLD SYSTEM STUDENTS OR (NEW SYSTEM WELSH-DOMICILED STUDYING IN WALES)- or a grant towards your tuition fees). Is this correct?

INTERVIEWER- If student has received loan for tuition fees or a grant towards tuition fees then code yes at this question."}

2.1 Student status

{Ask full-time students or part-time students on initial teacher training/ITT including students receiving NHS bursary}

LEAAS1

SHOWCARD D

IF AN APPLICATION HAS BEEN MADE: Whose income was taken into account in the application for financial support for tuition fees in this academic year?

IF NO APPLICATION WAS MADE: Whose income *would* have been taken into account if you had applied for support with your tuition fees?

NB THIS IS NOT REFERRING TO THE APPLICATION FOR A STUDENT LOAN.

CODE ALL THAT APPLY

Your own

Your natural parent(s)

Your step-parent(s)

Your legal guardian (s)

Your spouse's

Your partner's or co-habitee's

Any other person's (SPECIFY)

{Ask full-time students, sandwich students or part-time students on initial teacher training/ITT. Ask if another person is mentioned above. *Including students receiving NHS bursary*}

LEAAS2

WRITE IN PERSON

Independent and dependent students are defined as follows:

Independent students:

a) They are part-time students (at FTPT)

OR

b) They are full-time students aged 25+ (DOB)

c) They are full-time students who are married (MARITAL)

d) They are full-time students who are financially independent for 3 years prior to course (SUPFIN)_

e) They have children of their own living with them who are aged 16 or under, or in full-time education and aged 17 or 18 (CHILDHH)

Dependent students:

They are full-time students:

- a) Aged under 25 (DOB)
- b) Unmarried (MARITAL)
- c) Not financially independent for 3 years prior to course (SUPFIN)
- d) Do not have children *of their own living with them* who are aged 16 or under, or in full-time education and aged 17 or 18 (CHILDHH)

2.2 Tuition fees/grants for tuition fees – full-time students

- Amounts for fees will depend on (a) new/old system status (b) whether English- or Welsh-domiciled (c) whether studying at English or Welsh institution (d) the individual institution. Maximum values as below.
 - Old system student (English or Welsh-domiciled, regardless of where studying): £1,225
 - New system student (English-domiciled, studying in England): £3,070
 - New system student (English-domiciled studying in Wales): £3,000
 - New system student (Welsh-domiciled, studying in England or Wales): £3,070
 - XFEECON/XPARTIC/XSPEND – If the student is old system add £1225

{Ask (all part-time (non-ITT) & OU students) and (new system full-time) or (new system part-time ITT). Set to 1225 if old system full-time or old system part-time ITT. Not asked of students receiving NHS bursary.

CRSFEE

How much are the tuition fees for your course(s) in this academic year - by this I mean the amount the (college/ university/ Open University) charges, rather than the amount you personally pay if this is different. (IF OU STUDENT: Please include the fees for all courses you will be studying on from 1st August 2007 to the end of July 2008)?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10,000

{Checks if they are a part-time student or OU student on one course and give an amount above £1500, if they are OU student on 2 courses and the figure is above £3000, and if they are on 3 courses and the figure is above £4500. “Can I just check the amount you just told me as this seems quite high?”}

{Check if new system full-time/part-time ITT student and CrsFee <= 3070; The maximum amount your university or college can charge of tuition fees is £3070 per year. Can I check what I have recorded?}

Check if new system full-time/part-time ITT student and CrsFee >= 2700; This seems quite low. Can I just check what I have recorded?}

- XFEECON/XPARTIC/XSPEND – Add amount given

7.1.2 Dependent students (old system full-time OR new system full-time Welsh-domiciled studying in Wales OR part-time on ITT)

{Ask *dependent* old-system full-time students or part-time students on initial teacher training/ITT. Who applied for support via their Local Authority (or Student Loans Company)}

DTFAM

Did your Local Authority (or Student Loans Company) say that your family was expected to make a contribution to your tuition fees for this academic year?

Yes

No

{Check if PGCE students claim to pay tuition fees “PGCE students normally get their tuition fees paid from public funds. Are you sure that your family/you are paying for tuition fees?”}

{Ask *dependent* old-system full-time students or part-time students on initial teacher training/ITT. Who applied for support via their Local Authority (or Student Loans Company). If they or their family have to pay towards their tuition fees}

DTFAM1

The full parental contribution towards tuition fees in publicly funded colleges in this academic year is {textfill: fee amount}. Did you or your family need to...READ OUT...

Pay less than this amount

Or pay this amount?

{Ask *dependent* old-system full-time students or part-time students on initial teacher training/ITT. Who applied for support via their Local Authority (or Student Loans Company). If they or their family have to pay towards their tuition fees, except {textfill: fee amount}}

DTFAM2

How much money were your parents assessed to contribute towards your tuition fees this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to {textfill: fee amount}

{Ask *dependent* full-time/part-time ITT students who are old-system and parents expected to make contribution OR new-system .OR if student did not make an application for support}

DTFAM3

IF THE STUDENT IS OLD SYSTEM AND DID NOT MAKE AN APPLICATION FOR SUPPORT : Given you did not apply for Local Authority (or Student Loans Company) support, the fees for your course would be {textfill: fee amount}. How much money did your parents *actually* contribute towards your tuition fees this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to {textfill: fee amount}

{Check if amount parents gave towards tuition fees is more than the assessed contribution. "I have recorded that your parents gave you more money towards your tuition fees than the tuition fees actually cost. If they gave you money to cover other living expenses we will cover this later, so I will not record this here."}

- XPARENTS/XFAMILY/XINCOME – Add the amount answered at this question

{Ask *dependent* full-time/part-time ITT students who are old-system and parents expected to make no/partial contribution or new-system Welsh-domiciled students studying in Wales). Who applied for support via their Local Authority (or Student Loans Company).

DTWTFG

Can I just check, this academic year, did you receive, or do you expect to receive a Tuition Fee Grant from your Local Authority (or Student Loans Company) towards the costs of your tuition fees- please note this is not the same as Student Loans for Fees which I shall cover later?

INTERVIEWER IF NEEDED: You may be entitled to a grant for all or part of your tuition fees. This money does not have to be paid back.

Yes

No

{Check if new system Welsh-domiciled and studying and no: "Can I just check, if you have made an application for a Student Loan, you should automatically receive a grant of £1845 for your tuition fees paid directly to your university or college. Are you sure you have not received this?"}

{Check if old system and not expected to pay fees, and less than 1225: "You said that your parents/you (or your spouse/partner) were not expected to contribute to your fees but nor have you received any tuition fee grant . Can I check what I have recorded?"}

{Ask *dependent* full-time/part-time ITT students who are old-system or new-system Welsh-domiciled students studying in Wales). Who applied for support via their Local Authority (or Student Loans Company) and received a Tuition Fee Grant.

DTWTFGA

And how much tuition fee grant have you received or do you expect to receive this academic year from your Local Authority (or Student Loans Company)?INTERVIEWER ENCOURAGE BEST ESTIMATE IF STUDENT IS UNSURE

Numeric answer: range 1 to 1845

{Check if new system Welsh-domiciled and studying and less than 1800: "Normally students studying in Wales receive a grant of £1845 for tuition fees- can I just check that you did receive less than this?"}

{Check if old system and not expected to pay fees, and less than 1225: "You said that your parents were not expected to contribute to your fees but your grant was for less than the full amount of the fees. Can I check what I have recorded?"}

- XFEE/XMSTUD/XINCOME- Add amount answered at this question

{Ask *dependent* full-time/part-time ITT students who are old-system or new-system if the parental contribution and/or tuition fee grant is less than tuition fee amount OR if student did not make an application for support}

DTFWHO

Who else has contributed something towards the costs of your tuition fees or who do you expect to contribute towards your tuition fees this year. *We are only asking about financial help with your tuition fees and not any help with general living expenses..* Was it...READ OUT...

CODE ALL THAT APPLY

Yourself, including any loans you have taken out for fees

Your parent(s)/step parent(s)

Spouse or partner

Another relative

Your employer

The university or college you are studying at

A charitable trust

Or someone else or another organisation?

{Check if parent/step-parents is coded. "You have already told us about the £{AmountFromParents} that your parent(s) contributed, is the amount you are about to refer to in addition to this previous amount? Backcode as necessary"}

{Ask *dependent* full-time/part-time ITT students who are old-system or new-system if the parental contribution and/or tuition fee grant is less than tuition fee amount OR if student did not make an application for support}.

Repeat for each person or organisation coded as contributing towards tuition fees}

DTFWHAM

How much do you expect (person who will contribute to fees) will pay towards your tuition fees. Please include any money they may have paid for tuition fees already.

ADD IF UNI/COLLEGE: Please include any money that your university or college has already taken off tuition fees. But don't count any money you get from your university or college that is not specifically for tuition fees. INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to {textfill: fee amount}

{Check if amount of contributions adds to more than the amount of tuition fees they are expecting to pay. 'Can I just check that the amounts I have recorded as the contributions you have just told me add up to more than the amount of tuition fee you should pay'}{Check if amount of contributions adds to less than half than the amount of tuition fees they are expecting to pay. 'Can I just check that the amounts I have recorded as the contributions you have just told me add up to less than the amount of tuition fee you should pay'}

- XPARENTS/XFAMILY/XINCOME – If “Your parent/step-parents(s)” coded at DTFWHO, add amount given
- XPARTNER/XFAMILY/XINCOME – If “Spouse or partner” coded at DTFWHO, add amount given
- XRELS/XFAMILY/XINCOME – If “Another relative” coded at DTFWHO, add amount given
- XEMPL/XOSTUD/XINCOME – If “Your employer “ coded at DTFWHO, add amount given
- XUNICL/XOSTUD/XINCOME – If “Your university/college bursary” coded at DTFWHO, add amount given
- XCHAR/XOSTUD/XINCOME – If “A charitable trust “ coded at DTFWHO, add amount given
- XOTHSTUD/XOSTUD/XINCOME – If “someone else or another organisation “ coded at DTFWHO, add amount given

7.1.3 *Independent students(old system full-time OR new system full-time Welsh-domiciled studying in Wales OR part-time on ITT)*

{Ask *independent* old-system full-time students or part-time students on initial teacher training/ITT. Who applied for support via their Local Authority (or Student Loans Company) }

ITFFAM

Did your Local Authority (or Student Loans Company) say that you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner,) were expected to make a contribution to your tuition fees in this academic year?

Yes

No

{Check if PGCE students claim to pay tuition fees “PGCE students normally get their tuition fees paid from public funds. Are you sure that you are paying for tuition fees?”}

{Ask *independent* old-system full-time students or part-time students on initial teacher training/ITT. Who applied for support via their Local Authority (or Student Loans Company). If they or their spouse/partner have to pay towards their tuition fees}

ITFAM1

The full contribution towards tuition fees in publicly funded colleges in this academic year is {textfill: fee amount}. Did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner). need to...READ OUT...

Pay less than this amount

Pay this amount?

{Ask *independent* old-system full-time students or part-time students on initial teacher training/ITT. Who applied for support via their Local Authority (or Student Loans Company). If they or their spouse/partner have to pay towards their tuition fees, except {textfill: fee amount}}

ITFAM2

How much money were you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) assessed to contribute towards your tuition fees this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to {textfill: fee amount}

{Ask *independent* full-time/part-time ITT students who are old-system and expected to make contribution OR new system OR if student did not make an application for support
ITFAM3 }

IF THE STUDENT IS OLD SYSTEM AND DID NOT MAKE AN APPLICATION FOR SUPPORT : Given you did not apply for Local Authority (or Student Loans Company) support, the fees for your course would be {textfill: fee amount}.

How much money did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) *actually* contribute towards your tuition fees this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to {textfill: fee amount}

{Check if amount student or spouse/partner gave towards tuition fees is more than the assessed contribution. "I have recorded that you paid more money towards your tuition fees than the tuition fees actually cost. If you have spent money to cover other living expenses we will cover this later, so I will not record this here."}

{Ask *independent* full-time/part-time ITT students who are old system and expected to make no/partial contribution or new-system Welsh-domiciled students studying in Wales. Who applied for support via their Local Authority (or Student Loans Company).

ITWTFG

Can I just check, this academic year, have you received, or do you expect to receive a Tuition Fee Grant from your Local Authority (or Student Loans Company) towards the costs of your tuition fees- please note this is not the same as Student Loans for Fees which I shall cover later?

Yes

No

{Check if No: "You said you did not receive any Tuition Fee Grant for this academic year. Can I check why this is? (IF NO, INTERVIEWER PLEASE MAKE NOTE OF WHY)"}

{Check if new system Welsh-domiciled and studying and no: "Can I just check, if you have made an application for a Student Loan, you should automatically receive a grant of £1845 for your tuition fees paid directly to your university or college. Are you sure you have not received this?"}

{Check if old system and not expected to pay fees, and less than 1225: "You said that you you (or your spouse/partner) were not expected to contribute to your fees but nor have you received any tuition fee grant. Can I check what I have recorded?"}

{ Ask *independent* full-time/part-time ITT students who are old system or new-system Welsh-domiciled students studying in Wales). Who applied for support via their Local Authority (or Student Loans Company) and received a Tuition Fee Grant.

ITWTFGA

"And how much tuition fee grant have you received or do you expect to receive this academic year from your Local Authority (or Student Loans Company)?"

INTERVIEWER ENCOURAGE BEST ESTIMATE IF STUDENT IS UNSURE

Numeric answer: range 1 to 1845

{Check if new system Welsh-domiciled and studying and less than 1800: "Normally students studying in Wales receive a grant of £1845 for tuition fees- can I just check that you did receive less than this?"}

{Check if old system and not expected to pay fees, and less than 1225: "You said that your parents/you (or your spouse/partner) were not expected to contribute to your fees but your grant was for less than the full amount of the fees. Can I check what I have recorded?"}

- XFEE/XMSTUD/XINCOME- Add amount answered at this question

{ Ask *independent* full-time/part-time ITT students who are old system or new-system) if their actual contribution and/or tuition fee grant is less than tuition fee amount OR if student did not make an application for support}

ITFWHO

Who else has contributed something towards the costs of your tuition fees or who do you expect to contribute towards your tuition fees this year. *We are only asking about financial help with your tuition fees and not any help with general living expenses. Was it...READ OUT...*

CODE ALL THAT APPLY

Yourself, including any loans you have taken out for fees

Your parents/step-parent(s)

Spouse or partner

Another relative

Your employer

The university or college you are studying at

A charitable trust

Or someone else or another organisation?

{Check if spouse/partner/yourself is coded. "You have already told us about the £{AmountFromSelf/partner} that you expect yourself/partner/spouse to pay, is the amount you are about to refer to in addition to this previous amount?

Backcode as necessary"}}

{ Ask *independent* full-time/part-time ITT students who are old system or new-system) if their actual contribution and/or tuition fee grant is less than tuition fee amount OR if student did not make an application for support. Repeat for each person or organisation coded as contributing towards tuition fees}

ITFWHAM

How much do you expect (person who will contribute to fees) will pay towards your tuition fees. Please include any money they may have paid for tuition fees already?

ADD IF UNI/COLLEGE: Please include any money that your university or college has already taken off tuition fees. But don't count any money you get from your university or college that is not specifically for tuition fees.

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to {textfill: fee amount}

{Check if amount of contributions adds to more than the amount of tuition fees they are expecting to pay. 'Can I just check that the amounts I have recorded as the contributions you have just told me add up to more than the amount of tuition fee you should pay'}

{Check if amount of contributions adds to less than half than the amount of tuition fees they are expecting to pay. 'Can I just check that the amounts I have recorded as the contributions you have just told me add up to less than the amount of tuition fee you should pay'}

- XPARENTS/XFAMILY/XINCOME – If "Your parent/step-parents(s)" coded at DTFWHO, add amount given
- XPARTNER/XFAMILY/XINCOME – If "Spouse or partner" coded at DTFWHO, add amount given
- XRELS/XFAMILY/XINCOME – If "Another relative" coded at DTFWHO, add amount given
- XEMPL/XOSTUD/XINCOME – If "Your employer " coded at DTFWHO, add amount given
- XUNICL/XOSTUD/XINCOME – If "Your university/college bursary" coded at DTFWHO, add amount given
- XCHAR/XOSTUD/XINCOME – If "A charitable trust " coded at DTFWHO, add amount given
- XOTHSTUD/XOSTUD/XINCOME – If "someone else or another organisation " coded at DTFWHO, add amount given

2.3 Student Loans for Fees–full-time students

{Ask full-time students or part-time students on initial teacher training/ITT where tuition fee cost has not already been met by tuition fee grant and who made an application for support}

FLOAN

Have you received or do you expect to receive any *Student Loan for Tuition Fees* this academic year – please only tell me about any Student Loan for Fees, and not about Student Loan for Maintenance.

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support. All who have not applied for a Student Loan for Tuition Fees}

FLFUT

Do you intend to apply for a Student Loan for Tuition Fees for this academic year?

Yes

No

{All full-time or part-time students on initial teacher training/ITT who have applied for a Student Loan for Fees or who intend to apply for a loan}

FLAM1

Thinking about the Student Loan for Fees you said you have received or applied for in this academic year. How much will you receive or do you intend to apply for - you can tell me over the whole academic year or per term. *Please only give me the amount of your Student Loan for Fees, not any additional allowances you may have applied for?*

CODE TIME PERIOD. PROMPT FOR STUDENTS BEST ESTIMATE IF UNSURE.

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{All who have applied for a Student Loan for Fees or who intend to apply for a loan}

FLAM1PER

CODE AMOUNT

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3,070

{Check if amount of Student Loan is more than student's own contribution: "The amount of Student Loan more than the amount you said you (or your spouse/partner) contributed to your fees. I need to include this loan amount as part of your contribution as well. INTERVIEWER: If necessary, amend amount at DTFWHAM/ITFAM3 to include loan amount."}

- XFLOAN/XMSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at FLAM1
- XSTUDEBT/XBORR - Add amount given multiplied by the time period multiplier for answer at FLAM1

{Ask full-time students or part-time students on initial teacher training/ITT All who have *not* applied for a Student Loan for Fees and who are not planning to take out a loan.}

FLWHYN

SHOWCARD E

Why have you decided *not* to take out a Student Loan for Fees this academic year? PROBE: What other reasons?

CODE ALL THAT APPLY

I do not need the money to pay for my fees

I prefer to get a paid job rather than take out a loan

My parents/partner did not want me to

I am concerned about the repayments

Religious beliefs that do not permit paying interest

I do not like borrowing and am concerned about taking on more debts

I prefer to borrow from elsewhere

Still using up a loan taken out in a previous year

Other (Specify)

None of these

{Ask full-time students or part-time students on initial teacher training/ITT. All who have gave another reason for not applying for a Student Loan for Fees}

FLWHYNS

WRITE IN VERBATIM REASONS STUDENT WILL NOT TAKE LOAN

Open answer

2.4 Tuition fees/ grants for fees – part-time students

{Ask part-time students and OU students, excluding those on initial teacher training}

CRSGRA

Can I just check, this academic year, did you receive, or do you expect to receive a *Grant for Fees* from your Local Authority (or Student Loans Company) towards the costs of your tuition fees?

Yes

No

{Ask part-time students and OU students, excluding those on initial teacher training, if they received a Grant for Fees from Local Authority (or Student Loans Company)}

CRSAM

And how much grant for fees have you received or do you expect to receive this academic year from your Local Authority (or Student Loans Company)?

{Textfill routing- English domicile} INTERVIEWER IF STUDENT SAYS MORE THAN £1150: The maximum Grant for Fees is £1150, but you may have received a further £250 as a course grant. I will record £1150 as your answer and we will record the rest when we get to the section on course grants.

{Textfill routing- Welsh domicile} INTERVIEWER IF STUDENT SAYS MORE THAN £1150: The maximum Grant for Fees is £905, but you may have received a further £1,025 as a course grant. I will record £905 as your answer and we will record the rest when we get to the section on course grants.

INTERVIEWER ENCOURAGE BEST ESTIMATE IF STUDENT IS UNSURE

Numeric answer: range 1 to 1150

{Check if part-time and OU students answered with a higher amount than that given for the amount of their course fees. "You should not be receiving more money as a Grant for Fees than the cost of your tuition fees. Can I check the answers I have recorded?"}

- XFEE/XMSTUD/XINCOME – Add amount given

{Ask part-time students and OU students, excluding those on initial teacher training, who either receive no Grant for Fees or whose Grant for Fees is less than the course tuition fees}

CRSOTH

Who paid the (remaining) costs of your tuition fees or who else do you expect to pay towards this. We are only asking about financial help with your tuition fees and not any help with general living expenses, books or equipment. If you paid your tuition fees yourself, but expect to be reimbursed by an employer or organisation, please count this as their payment not your own. ...READ OUT..

CODE ALL THAT APPLY

Yourself, including any loans you have taken out for fees

Your natural parent(s)/step-parent(s)

Your spouse or partner

Your employer

Or someone else/organisation(s)?

{Ask part-time students and OU students, excluding those on initial teacher training, who either receive no Grant for Fees or whose Grant for Fees is less than the course tuition fees. Repeat for 'You', 'Your natural parent(s)/Your step-parent(s)' and 'Your spouse or partner'}

CRSAM2

Of the remaining amount of your tuition fees £(Total fees minus Grant for Fees), how much has been or will be paid by {CRSOTH answer}?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 15000

{Check if answers given for all types of contribution add to more than the course fee. "The Local Authority (or Student Loans Company) contribution and other contributions add to more than the £CRSFEE cost of the tuition fees. Can I check the answers I have recorded."}

- XPARENTS/XFAMILY/XINCOME – If "Your natural parent/step-parents(s)" coded at CRSOTH, add amount given
- XPARTNER/XFAMILY/XINCOME – If "Spouse or partner" coded at CRSOTH, add amount given
- XOTHSTUD /XOSTUD/XINCOME – If "Someone else" coded at CRSOTH, add amount given
- XEMPL / XOSTUD / XINCOME - If "Employer" coded at CRSOTH, add amount given

{Ask part-time students and OU students, excluding those on initial teacher training, who either receive no Grant for Fees or whose Grant for Fees and other contributions do not cover the course tuition fees}

TUELSE

Who (else) has paid something towards the costs of your tuition fees or who do you expect to pay towards your tuition fees this year...READ OUT....

Other relatives

The university or college you are studying at

A charitable trust

Or was it money from another source?

{Ask part-time students and OU students, excluding those on initial teacher training, who either receive no Grant for Fees or whose Grant for Fees and other contributions do not cover the course tuition fees, who said that the university or college they were studying at paid something towards the costs of their tuition fees}

TUELSWH

Did your university or college pay something towards the costs of your tuition fees through...READ OUT....

A bursary from your university or college,

A scholarship from your university or college,

Or through the Additional Fee Support Scheme?

Other (DO NOT READ OUT).

{Ask part-time students and OU students, excluding those on initial teacher training, who will receive/have received any money through the Additional Fee Support Scheme }

ADFSSAM

How much money from the Additional Fee Support Scheme have you received or do you expect to receive over this academic year that is between DATE and DATE?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 1000

- XUNICL /XOSTUD/XINCOME –Add amount given

3 HIGHER EDUCATION RELATED INCOME

{NB students receiving NHS Bursaries from DoH/NHS Wales will not be asked questions in this section unless it is explicit in the routing of the questions}

3.1 Range of support

INTRO

I'm now going to ask you about various different types of financial support you can receive from your Local Authority (or Student Loans Company) (IF ON NHS COURSE: Department of Health or NHS Wales), the Student Loans Company, your university or other student organisations.

Continue

3.1.1 Full-time/PGCE students

{Ask full-time students or part-time students on initial teacher training/ITT}

FTSUP1

SHOWCARD F , G (England), H , I (Wales)

Please take your time and read through these cards showing the funding available, before I ask you questions about these.

WAIT UNTIL STUDENT HAS READ THROUGH THE SHOWCARDS

Continue

{Ask full-time students or part-time students on initial teacher training/ITT}

FTSUP2

Have you received or are you expecting to receive any of these types of student support?

Yes

No

3.1.2 *Part-time/OU students*

{Ask part-time students (excluding those on initial teacher training/ITT) and OU students}

PTSUP1

SHOWCARD J , K

Please take your time and read through this card showing the funding available, before I ask you questions about these.

WAIT UNTIL STUDENT HAS READ THROUGH THE SHOWCARDS

Continue

{Ask part-time students (excluding those on initial teacher training/ITT) and OU students}

PTSUP2

Have you received or are you expecting to receive any of these types of student support?

Yes

No

3.2 **Receipt and application for support**

3.2.1 *Full-time students*

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support.

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support.

SLOAN

"Have you received or do you expect to receive any Student Loan for **Maintenance** to cover your living costs this academic year? Please do not include any Student Loan taken out for Fees.

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support. All who have not applied for a basic Student Loan}

LFUT

Do you intend to apply for a Student Loan for Maintenance for this academic year?

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support.. All who have applied for a Student Loan or who intend to apply for a loan}

{2003 4-5}

LWEEKS1

Have you received, or do you expect to receive any additional weeks' allowances as part of your Student Loan for Maintenance this academic year because your course is longer than 30 weeks?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask new system full-time students or part-time students on initial teacher training/ITT in England. Ask those who will receive some financial support. }

MTNG

(Have you received, or do you expect to receive) any money as part of a Maintenance Grant this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask new system full-time students or part-time students on initial teacher training/ITT in England and Wales. Ask those who will receive some financial support.}

SSG

(Have you received, or do you expect to receive) any money as part of a Special Support Grant this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask old system full-time students or part-time students on initial teacher training/ITT in England or Wales. Ask those who will receive some financial support }

HEG

(Have you received, or do you expect to receive) any money as part of a Higher Education Grant towards the cost of your higher education?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support. Ask those with dependent children.}

CHGR

(Have you received, or do you expect to receive) any money as a Childcare Grant this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support. Ask those with dependent children }

PLA

(Have you received, or do you expect to receive) any money as part of the Parents' Learning Allowance this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT. Ask those who will receive some financial support. Ask students who have a dependent adult in their household}

ADG

(Have you received, or do you expect to receive) any money as part of an Adult Dependants' Grant this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full- or part-time students in England studying for PGCE/Initial Teacher training. Ask those who will receive some financial support.}

EITT

(Have you received, or do you expect to receive) any money through a Training Bursary related to your teacher training course or for studying a secondary priority subject?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

INTERVIEWER: Priority subjects include Maths, Science, English, Drama, Information Communication Technology (ICT), Design and Technology, Modern languages, Religious education and Music.

Yes

No

{Ask full- or part-time students in England studying for PGCE/Initial Teacher training. Ask those who will receive some financial support. Ask those who have received Teacher training related support}

EITTWH

Which ones...READ OUT...

CODE ALL THAT APPLY

Training Bursary

Or money for studying a secondary priority subject?

{Ask full- or part-time students in Wales studying for PGCE/Initial Teacher training. Ask those who will receive some financial support.}

WITT

(Have you received, or do you expect to receive) any money through a Training Grant or Teaching Grant related to your teacher training course, the Teacher Training Recruitment Scheme or the Welsh-Medium Incentive Supplement?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full- or part-time students in Wales studying for PGCE/Initial Teacher training. Ask those who will receive some financial support. Ask those who have received Teacher training related support}

WITTWH

Which ones...READ OUT...

CODE ALL THAT APPLY

Training Grant

Teaching Grant

Teacher Training Recruitment Scheme

or the Welsh-Medium Incentive Supplement?

{Ask full-time students who are on a medical/dentistry course (excluding those on NHS bursaries) or full-time students who have a placement abroad. Ask those who will receive some financial support. }

TRAV

(Have you received, or do you expect to receive) any money towards extra travel costs as a result of your course this academic year. We will ask about Socrates-Erasmus funding later on, so please do not include any money you have received through this here?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT in England & Wales. Ask those who will receive some financial support.}

SCHOL

(Have you received, or do you expect to receive) any money as part of a scholarship from your university or college this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT in England. Ask those who will receive some financial support. }

ECLBR

(Have you received, or do you expect to receive) any money as part of a bursary from your university or college this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask full-time students or part-time students on initial teacher training/ITT in Wales. Ask those who will receive some financial support.}

WCLBR

(Have you received, or do you expect to receive) any money as part of a bursary from your university or college, including any made through the Welsh Bursary Scheme, this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

3.2.2 Part-time/OU students

{Ask part-time students and OU students, excluding those on initial teacher training. Ask those who will receive some financial support.}

CRSG

Have you received, or do you expect to receive any money as part of a course grant paid by the Student Loans Company {OU students: or Open University} for books, travel and other course costs this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask OU students who will receive some financial support.}

SAF

Have you received or do you expect to receive any money from the emergency fund for Open University Students called the Student Assistance Fund?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask OU students who will receive some financial support.}

CF

(Have you received, or do you expect to receive) any money from the Crowther Fund for Open University students?

INTEVIEWER IF NEEDED: This is the fund that tries to help Open University graduates to build on their qualifications by formal study, research or supporting a period of voluntary work

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask OU students who will receive some financial support.}

OUCOM

Have you received, or do you expect to receive any money from the Open University in the form of a computer grant or an internet grant?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

3.2.3 All students

{Ask students except OU students, who ordinarily lived in Wales before the course and attend a college/uni. Those who will receive some financial support.}

WAL

(Have you received, or do you expect to receive) any money as part of a Welsh Assembly Learning Grant this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask students who will receive some financial support }

DSA1

Have you received or do you expect to receive any Disabled Students' Allowance this academic year ?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask students who will receive some financial support and who have or expect to receive DSA}

DSA2

SHOWCARD L

Thinking about the Disabled Students' Allowance you receive. Which of the following allowances have you received or do you expect to receive?

CODE ALL THAT APPLY

A general disabled students' allowance (up to £1,640 for full-time students, £1,230 for part-time students)

Specialist equipment allowance (up to £4,905 for the whole course)

A non-medical helpers' allowance (up to £12,420 a year for full-time students, £9,315 for part-time students)

Extra travel costs (unlimited amounts depending on individual assessment)

I'm not sure which (Code if spontaneously mentioned)

{Ask all studying in England. Ask those who will receive some financial support.}

ACC

(Have you received, or do you expect to receive) any money from your college or university through Access to Learning Funds?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask all studying in Wales. Ask those who will receive some financial support.}

CFC

(Have you received, or do you expect to receive) any money from your college or university through the Financial Contingency Funds scheme or FCF scheme? {IF OU: As an OU student you may know this form of support as the Access to Learning Fund in Wales}.

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask all those who will receive some financial support.}

CDL

(Have you received, or do you expect to receive) any money as part of a Career Development Loan this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Check – if any other support is received. "Are you sure you receive this Career Development Loan because you can't get this if you receive other student funding from the Government?"}

{Ask all those who will receive some financial support. Ask all, except OU students}

ERAS

(Have you received, or do you expect to receive) any money as part of the Socrates-Erasmus exchange programme this academic year?

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{Ask all those who will receive some financial support. }

TRUST

(Have you received, or do you expect to receive) any money from an educational trust or charity that makes individual awards to students this academic year?

IF NEEDED: Please do not include any support that you have already mentioned regarding tuition fees.

INTERVIEWER: REFER STUDENT BACK TO SHOWCARD FOR MORE DETAILS OF THIS FUNDING

Yes

No

{ Ask all those who will receive some financial support. }

OTHFUND

And have you received, or do you expect to receive any money from *any other* grants, awards or scholarships no matter how small the amount?

Yes

No

3.3 Grants and awards details – full-time students or part-time students on ITT

INTROAM

I will now ask you in more detail about the different types of student support.

Continue

3.3.1 Student Loan

{All full-time students or part-time students on ITT who have applied for a Student Loan for Maintenance or who intend to apply for a loan}

LAM1

Thinking about the Student Loan for Maintenance you said you have received or applied for. How much will you receive or do you intend to apply for? You can tell me over the whole academic year or per term. Please only give me the amount of your Student Loan for **Maintenance**, excluding any Student Loan for Fees or additional allowances you may have applied for?

IF STUDENT NEEDS PROMPTING, THESE ARE MAXIMUM AMOUNTS FOR DIFFERENT STUDENTS. READ OUT AS NECESSARY. CODE TIME PERIOD. PROMPT FOR STUDENTS BEST ESTIMATE IF UNSURE.

-Living in London – Up to £6,315 (in final year of study £5,750)

-Living elsewhere – Up to £4,510 (in final year of study £4,175)

-Living at parents' home – Up to £3,495 (in final year of study £3,155)

-Studying abroad for 8 weeks or more – Up to £5,375 (in final year of study £4,675)

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{All full-time students or part-time students on ITT who have applied for a Student Loan or who intend to apply for a loan}

LAM1PER

CODE AMOUNT

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 6315

- XMLOAN/XMSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at LAM1

- XSTUDEBT/XBORR - Add amount given multiplied by the time period multiplier for answer at LAM1

{All full-time students or part-time students on ITT who will get or expect to get extra weeks allowances}

LWEEKS2

I'd like to know how much you expect to receive in additional weeks' allowances alongside your Student Loan for this academic year. You can tell me for the whole academic year or per week?

CODE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{All full-time students or part-time students on ITT who will get or expect to get extra weeks allowances}

LWEEKS3

CODE AMOUNT

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 2200

- XMLOAN/XMSTUD/XINCOME - Add amount given multiplied 1 if year is coded at LWEEKS2

{All full-time students or part-time students on ITT who will get or expect to get extra weeks allowances and gave their answers in weeks}

LWEEKS4

How many additional weeks above 30 weeks does your course run for?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 22

- XMLOAN/XMSTUD/XINCOME - Add amount given at LWEEKS3 multiplied by the answer given here if week is coded at LWEEKS2

{Ask full-time students or part-time students on initial teacher training/ITT. All who have *not* applied for a Student Loan for Maintenance and who are not planning to take out a loan.}

LWHYH

SHOWCARD M

Why have you decided *not* to take out a Student Loan for Maintenance this academic year? PROBE: What other reasons?

CODE ALL THAT APPLY

I do not need the money to cover my living costs

I prefer to get a paid job rather than take out a loan

My parents/partner did not want me to

I am concerned about the repayments

Religious beliefs that do not permit paying interest

I do not like borrowing and am concerned about taking on more debts

I prefer to borrow from elsewhere

Still using up a loan taken out in a previous year

Other (Specify)

None of these

{Ask full-time students or part-time students on initial teacher training/ITT All who have gave another reason for not applying for a Student Loan}

LWHYNS

WRITE IN VERBATIM REASONS STUDENT WILL NOT TAKE LOAN

Open answer

3.3.2 Maintenance Grant

{All new-system full-time students or part-time students on ITT who have received or expect to receive any Maintenance Grant}

MGP1

How much Maintenance Grant have you received or do you expect to receive over the whole academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All new-system full-time students or part-time students on ITT who have received or expect to receive any MG}

MGAM

CODE THE AMOUNT

Numeric answer: range 1 to 2765

{Check if the student gets more than £2765 per year “The maximum maintenance grant for you would be £2765 per year. Can I check what I have recorded?”}

- XMNTG/XMSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at MGP1 if year or term is coded at MGP1

{ All new-system full-time students or part-time students on ITT who have received or expect to receive any MG and have given the amount per month or week}

MGP2

How many (weeks/months) do you receive this per academic year?

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XMNTG/XMSTUD/XINCOME - Add amount given at MGAM multiplied by the answer given if month or week is coded at MGP1

3.3.3 Special Support Grant

{ All new-system full-time students or part-time students on ITT who have received or expect to receive any SSG}

SSGP1

How much Special Support Grant have you received or do you expect to receive over the whole academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All new-system full-time students or part-time students on ITT who have received or expect to receive any SSG}

SSGAM

CODE THE AMOUNT

Numeric answer: range 1 to 2765

{Check if the student gets more than £2765 per year “The maximum special support grant for you would be £2765 per year. Can I check what I have recorded?”}

- XSSG/XMSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at SSGP1 if year or term is coded at SSGP1

{ All new-system full-time students or part-time students on ITT who have received or expect to receive any SSG and have given the amount per month or week}

SSGP2

How many (weeks/months) do you receive this per academic year?

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XSSG/XMSTUD/XINCOME - Add amount given at SSGAM multiplied by the answer given if month or week is coded at SSGP1

3.3.4 Higher Education Grant for old system students

{All old-system full-time students or part-time students on ITT who have received or expect to receive any HEG}

HEGP1

How much Higher Education Grant have you received or do you expect to receive over the whole academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask first year students who have received or expect to receive any HEG}

HEGAM

CODE THE AMOUNT

Numeric answer: range 1 to 1000

{Check if the student gets more than £1000 per year "The maximum higher education grant for you would be £1000 per year. Can I check what I have recorded?"}

- XHEG/XMSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at HEGP1 if year or term is coded at HEGP1

{ All old-system full-time students or part-time students on ITT who have received or expect to receive any HEG and have given the amount per month or week}

HEGP2

How many (weeks/months) do you receive this per academic year?

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XHEG/XMSTUD/XINCOME - Add amount given at HEGAM multiplied by the answer given if month or week is coded at HEGP1

3.3.5 Childcare Grant

{Ask full-time students or part-time students on ITT who have dependent children at home who will receive/have received any Childcare Grant}

CHCP1

I'd like to know how much Childcare Grant you have received or you expect to receive over the academic year.

You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask full-time students or part-time students on ITT who have dependent children at home who will receive/have received any Childcare Grant}

CHCAM

RECORD THE AMOUNT

Numeric answer: range 1 to 13,260

- XCHSUP/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at CHCP1 if year or term is coded at CHCP1

{Ask full-time students or part-time students on ITT who have dependent children at home who will receive/have received any Childcare Grant and have given amounts weekly or monthly}

CHCP2

How many (weeks/months) do you receive this per year?

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

{Check if the student has 1 child and is the amount weekly is more than £149 "The maximum Childcare Grant for you would be £149. Can I check what I have recorded?"}

{Check if the student has 1 dependent child and the amount for the academic year is more than £7,735 "The maximum Childcare Grant for you would be £7,735. Can I check what I have recorded?"}

{Check if the student has 2 or more dependent children and the amount weekly is more than £255 "The maximum Childcare Grant for you would be £255. Can I check what I have recorded?"}

{Check if the student has 2 or more dependent children the amount for the academic year is more than £13,260 "The maximum Childcare Grant for you would be £13,260. Can I check what I have recorded?"}

- XCHSUP/XOSTUD/XINCOME - Add amount given at CHCAM multiplied by the answer given here if month or week is coded at CHCP1

3.3.6 Parents' Learning Allowance

{Ask full-time students or part-time students on ITT who have dependent children at home who will receive/have received any a Parents' Learning Allowance}

PLAP1

How much Parents' Learning Allowance have you received or do you expect to receive over the academic year?

You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask full-time students or part-time students on ITT who have dependent children at home who will receive/have received any a Parents' Learning Allowance}

PLAAM

CODE THE AMOUNT

Numeric answer: range 1 to 1435

{Check if the student gets more than £1435 per year "The maximum Parents' Learning Allowance for you would be £1435 per year. Can I check what I have recorded?"}

- XCHSUP/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at PLAP1 if year or term is coded at PLAP1

{Ask full-time students or part-time students on ITT who have dependent children at home who will receive/have received any a Parents' Learning Allowance and have given amounts weekly or monthly}

PLAP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

{Check if the student gets more than £1435 per year "The maximum Parents' Learning Allowance for you would be £1435 per year. Can I check what I have recorded?"}

- XCHSUP/XOSTUD /XINCOME - Add amount given at PLAAM multiplied by the answer given here if month or week is coded at PLAP1

3.3.7 Adult Dependants' Grant

{All full-time students or part-time students on ITT who will receive/have received any Adult Dependants' Grant}

ADGP1

How much Adult Dependants' Grant have you received or do you expect to receive over the academic year?

You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time students or part-time students on ITT who will receive/have received any Adult Dependants' Grant}

ADGAM

CODE THE AMOUNT

Numeric answer: range 1 to 2510

{Check if the student gets more than £2510 per year "The maximum Adult Dependants' Grant would be £2510 per year. Can I check what I have recorded?"}

- XDEP/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at ADGP1 if year or term is coded at ADGP1

{ All full-time students or part-time students on ITT who will receive/have received any Adult Dependants' Grant and have given amounts weekly or monthly}

ADGP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

{Check if the student gets more than £2510 per year "The maximum Adult Dependants' Grant would be £2510 per year. Can I check what I have recorded?"}

XDEP/XOSTUD /XINCOME - Add amount given at ADGGAM multiplied by the answer given here if month or week is coded at ADGP1

3.3.8 Teacher Training related funds- England

{All full-time or part-time students on PGCE/ITT who will receive/have received any Training Bursary in England}

EITTP1

How much Training Bursary have you received or do you expect to receive in this academic year?

You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Training Bursary in England}

EITTAM

CODE THE AMOUNT

Numeric answer: range 1 to 6000

{Check if the student gets more than £6000 per year “The maximum Training Bursary for you would be £6000 per year. Can I check what I have recorded?”}

- XTEACH/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at EITTP1 if year or term is coded at EITTP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Training Bursary in England and have given amounts weekly or monthly}

EITTP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XTEACH /XOSTUD/XINCOME - Add amount given at EITTAM multiplied by the answer given here if month or week is coded at EITTP1

{ All full-time or part-time students on PGCE/ITT in England who will receive/have received any money for studying a Secondary Priority Subject }

SHORP1

How much money from the have you received or do you expect to receive for studying a secondary priority subject in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time or part-time students on PGCE/ITT in England who will receive/have received any money for studying a Secondary Priority Subject }

SHORAM

CODE THE AMOUNT

Numeric answer: range 1 to 9000

{Check if the student gets more than £9000 per year “The maximum you could have received for studying a secondary priority subject would be £9000 per year. Can I check what I have recorded?”}

- XTEACH/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at SHORP1 if year or term is coded at SHORP1

{ All full-time or part-time students on PGCE/ITT in England who will receive/have received any money for studying a Secondary Priority Subject }and have given amounts weekly or monthly}

SHORP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XTEACH /XOSTUD /XINCOME - Add amount given at SHORAM multiplied by the answer given here if month or week is coded at SHORP1

3.3.9 Teacher Training related funds- Wales

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Training Grant in Wales}

WITTP1

How much Training Grant have you received or do you expect to receive in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Training Grant in Wales}

WITTAM

CODE THE AMOUNT

Numeric answer: range 1 to 9000

{Check if the student gets more than £9000 per year "The maximum training grant for you would be £9000 per year. Can I check what I have recorded?"}

- XTEACH/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier if year or term is coded at WITTP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Training Grant in Wales and have given amounts weekly or monthly}

WITTP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XTEACH /XOSTUD /XINCOME - Add amount given at WITTAM multiplied by the answer given here if month or week is coded at WITTP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Teaching Grant in Wales}

WITCP1

How much Teaching Grant have you received or do you expect to receive in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Teaching Grant in Wales}

WITCAM

CODE THE AMOUNT

Numeric answer: range 1 to 5000

{Check if the student gets more than £5000 per year "The maximum teaching grant for you would be £5000 per year. Can I check what I have recorded?"}

- XTEACH/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier if year or term is coded at WITTCP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any Teaching Grant in Wales and have given amounts weekly or monthly}

WITCP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XTEACH /XOSTUD /XINCOME - Add amount given at WITTAM multiplied by the answer given here if month or week is coded at WITTP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any money through the Teacher Training Recruitment Scheme in Wales}

TTRSP1

How much money have you received or do you expect to receive from the Teacher Training Recruitment Scheme, including the Secondary

Undergraduate Placement Grant, in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who will receive/have received any money through the Teacher Training Recruitment Scheme in Wales}

TTRSAM

CODE THE AMOUNT

Numeric answer: range 1 to 1000

{Check if the student gets more than £1000 per year "The maximum amount you could receive as part of the Teacher Training Recruitment Scheme in Wales would be £1000 per year. Can I check what I have recorded?"}

- XTEACH/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier if year or term is coded at TTRSP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any money through the Teacher Training Recruitment Scheme in Wales and have given amounts weekly or monthly}

TTRSP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XTEACH /XOSTUD /XINCOME - Add amount given at TTRSAM multiplied by the answer given here if month or week is coded at TTRSP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any money through the Welsh-Medium Incentive Supplement in Wales}

WMISP1

How much money from the Welsh-Medium Incentive Supplement have you received or do you expect to receive in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time or part-time students on PGCE/ITT who will receive/have received any money through the Welsh-Medium Incentive Supplement in Wales}

WMISAM

CODE THE AMOUNT

Numeric answer: range 1 to 1200

{Check if the student gets more than £1200 per year "The maximum amount you could receive as part of the Welsh-Medium Incentive in Wales would be £1200 per year. Can I check what I have recorded?"}

- XTEACH/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at WMIP1 if year or term is coded at WMIP1

{ All full-time or part-time students on PGCE/ITT who will receive/have received any money through Welsh-Medium Incentive Supplement in Wales and have given amounts weekly or monthly}

WMIP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XTEACH /XOSTUD /XINCOME - Add amount given at WMISAM multiplied by the answer given here if month or week is coded at WMIP1

3.3.10 Extra travel costs related to the course

{ All full-time who are on a medical/dentistry course (excluding NHS bursaries) or full-time students who have a placement abroad who will receive/have received any extra travel costs}

TRAVP1

Thinking about the money given to you for extra travel relating to your course, how much money for extra travel costs have you received or do you expect to receive in this academic year - you can tell me this for the whole academic year, per term, per month or per week.

We will ask about Socrates-Erasmus funding later on, so please do not include any money you have received through this here?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time who are on a medical/dentistry course (excluding NHS bursaries) or full-time students who have a placement abroad who will receive/have received any extra travel costs}

TRAVAM

CODE THE AMOUNT

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 8000

{Check if the student gets more than £8000 per year "The maximum amount you could receive as extra travel costs would be £8000 per year. Can I check what I have recorded?"}

- XOTHSTUD/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at TRAVP1 if year or term is coded at TRAVP1

{ All full-time who are on a medical/dentistry course (excluding NHS bursaries) or full-time students who have a placement abroad who will receive/have received any extra travel costs and have given amounts weekly or monthly}

TRAVP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XOTHSTUD /XOSTUD /XINCOME - Add amount given at TRAVAM multiplied by the answer given here if month or week is coded at TRAVP1

3.3.11 Scholarships from college/university

{ All full-time students or part-time students on ITT who will receive/have received any from their college or university as part of a scholarship}

UCSCOL1

How much money have you received or do you expect to receive from your college or university as part of a scholarship in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time students or part-time students on ITT who will receive/have received any from their college or university as part of a scholarship }

UCSCOLAM

CODE THE AMOUNT

Numeric answer: range 1 to 3000

{Check if the student gets more than £3000 per year "The maximum amount you could receive as part of a scholarship from your college or university would be £3000 per year. Can I check what I have recorded?"}

- XUNICL/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at UCSCOL1 if year or term is coded at UCSCOL1

{ All full-time students or part-time students on ITT who will receive/have received any from their college or university as part of a scholarship and have given amounts weekly or monthly}

UCSCOL2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XUNICL /XOSTUD /XINCOME - Add amount given at UCSCOLAM multiplied by the answer given here if month or week is coded at UCSCOL1

3.3.12 Bursaries from college or university / Welsh Bursary Scheme

{All full-time students or part-time students on ITT who will receive/have received any money as a bursary from their college or university- in England}
EUCBRS1

How much money as part of a bursary from your college or university have you received or do you expect to receive in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time students or part-time students on ITT who will receive/have received any money through from college/university}

EUCBAM

CODE THE AMOUNT

Numeric answer: range 1 to 3000

- XEBRS/ XUNICL/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at EUCBRS1 if year or term is coded at EUCBRS1

{ All full-time students or part-time students on ITT who will receive/have received any money through from college/university and have given amounts weekly or monthly}

EUCBRS2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

CHECK calculate amount received for the whole year. "So for this academic year, you would receive about £xxx (Bursary amount) as part of your bursary. Does that sound about right?" If no, recode amounts/time periods.

CHECK: if yearly amount derived here is similar to or greater than support from university/college for fees: "You mentioned earlier that you also received £xxx (support for fees amount) from your university/college towards your tuition fees this year. Can I check whether this is included in the £xxx (Bursary amount) you received as part of your bursary?" IF YES, EXCLUDE THIS FROM QUESTIONS ABOVE. IF NO, CONTINUE.

XEBRS/ XUNICL /XOSTUD /XINCOME - Add amount given at EUCBAM multiplied by the answer given here if month or week is coded at EUCBRS1

{ All full-time students or part-time students on ITT who will receive/have received any money through bursaries including the Welsh Bursary Scheme- in Wales}

WUCBRS1

How much money as have you received or do you expect to receive as part of a bursary from your college or university, including the Welsh Bursary Scheme in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{ All full-time students or part-time students on ITT who will receive/have received any money through bursaries the Welsh Bursary Scheme}

WUCBAM

CODE THE AMOUNT

Numeric answer: range 1 to 3000

- XWBRS/ XUNICL/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at WUCBRS1 if year or term is coded at WUCBRS1

{ All full-time students or part-time students on ITT who will receive/have received any money as a bursary through the Welsh Bursary Scheme- in Wales and have given amounts weekly or monthly}

WUCBRS2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XWBRS/ XUNICL /XOSTUD /XINCOME - Add amount given at WUCBAM multiplied by the answer given here if month or week is coded at WUCBRS1

3.4 Grants and awards details – part-time and OU students

3.4.1 Course Grant

{Ask part-time students and OU students, excluding those on initial teacher training and who will/have received any Course Grant}

CRSGAM

How much Course Grant have you received or do you expect to receive over this academic year that is between DATE and DATE?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 250

- XCOUGR /XMSTUD /XINCOME - Add amount answered

3.4.2 OU students special assistance

{Ask OU students who have received or expect to received help from the Student Assistance Fund }

SAFAM

How much money from the Student Assistance Fund for Open University students have you received or do you expect to receive over the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 800

{Check if over £100 “This is a quite a large amount to be given from the Student Assistance Fund. Can I just check the figure I have entered is correct?”}

- XOTHSTUD/XOSTUD/XINCOME - Add amount answered

{Ask OU students who have received or expect to receive help from the Crowther Fund}

CFAM

How much money from the Crowther Fund for Open University students do you expect to receive over the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3000

- XOTHSTUD/XOSTUD/XINCOME - Add amount answered

{Ask OU students who have received or expect to receive help from the Crowther Fund}

OUCOMAM

How much money from Open University computer grants or internet grants do you expect to receive over the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3000

- XOTHSTUD/XOSTUD/XINCOME - Add amount answered

3.5 NHS bursary – students receiving support from DoH/NHS Wales

3.5.1 Tuition fees

{Ask students who have received/will receive DOH/NHS Wales support through the NHS bursary}

NHSFEE

You have told me that you will receive financial support from the NHS Bursary scheme. Have you and your family have had to pay any tuition fees this year?

Haven't had to pay any tuition fees

Student/family *have* had to pay tuition fees

{Check if *have* paid tuition fees "Normally tuition fees are paid as part of the NHS bursary, are you sure you receive the NHS bursary? You may be on a health professional course but still receive student financial support though you Local Authority (or Student Loans Company) (If so, re-code answer about receipt of NHS bursary)}

3.5.2 Standard Bursary and extra weeks allowance

{Ask students who have received/will receive DOH/NHS Wales support through the NHS bursary}

NHSB1

Thinking about the *standard* NHS bursary you have received or applied for. How much will you receive or do you expect to receive in this academic year; you can tell me over the whole academic year or per month. Please only give me the amount of your basic Bursary, not any additional allowances or any Student Loan you may have applied for?

PROMPT FOR STUDENTS BEST ESTIMATE IF THEY ARE UNSURE

CODE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who have received/will receive DOH/NHS Wales support through the NHS bursary}

NHSB2

CODE AMOUNT OF NHS BURSARY RECEIVED

Numeric answer: range 1 to 10,000

{Check if student receives more than £7443 a year "This seems quite high. Can I just check what I have recorded?"}

- XNHS/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at NHSB1

{Ask students who have received/will receive DOH / NHS Wales support through the NHS bursary}

LNHSXW1

Do you get or expect to get any money in additional weeks' allowances alongside your NHS Bursary?

Yes

No

{Ask students who have received/will receive DOH/NHS Wales support through the NHS bursary and who get or expect to get extra weeks allowances }

LNHSXW2

How much extra weeks allowance do you receive or expect to receive in this academic year - you can tell me for the whole academic year or per week?

CODE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who have received/will receive DOH / NHS Wales support through the NHS bursary and who get or expect to get extra weeks allowances}

LNHSXW3

CODE AMOUNT

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 2200

- XNHS/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer at LNHSXW1 if year is coded at LNHSXW1

{Ask students who have received/will receive DOH / NHS Wales support through the NHS bursary and who get or expect to get extra weeks allowances and gave their answers in weeks}

LNHSXW4

How many additional weeks above 30 weeks does your course run for?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 22

- XNHS/XOSTUD/XINCOME - Add amount given at LNHSXW2 multiplied by the answer given here if week is coded at LNHSXW1

3.5.3 Other NHS Bursary allowances

{Ask students who have received/will receive DOH / NHS Wales support through the NHS bursary}

NHSBA1

SHOWCARD N

Here is a list of other allowances that you may receive in addition to the standard Bursary. Please tell me which of these you receive or expect to receive in this academic year?

CODE ALL THAT APPLY

Older Students

Dependants

Single parents

Disabled Students

Hardship Grant

Childcare allowance

Parents Learning Allowance

Two homes grant

Initial Expenses

Practice Placement Expenses

None of these – code if spontaneously mentioned

{Ask students who have received/will receive DOH /NHS Wales support through the NHS bursary and who receive extra allowances}

NHSBA2

Thinking about these extra allowances you have received or applied for. How much will you receive in total from these allowances; you can tell me over the whole academic year or per month?

PROMPT FOR STUDENTS BEST ESTIMATE IF THEY ARE UNSURE

CODE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who have received/will receive DOH / NHS Wales support through the NHS bursary and who receive extra allowances }

NHSBA3

CODE AMOUNT OF EXTRA ALLOWANCES RECEIVED

Numeric answer: range 1 to 10,000

{Check if student receives more than £5000 a year "This seems quite high. Can I just check what I have recorded?"}

- XNHS/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer given at NHSBA2

3.5.4 Student Loan for NHS funded students

{QUERY: please note no questions about Student Loan for Fees included for NHS bursary students, assuming that their fees are always paid}{Ask full-time students who have received/will receive DOH / NHS Wales support through the NHS}

NHSL1

Have you applied for or will you apply for a Student Loan for Maintenance through your Local Authority (or Student Loans Company)?

Yes

No

{Ask full-time students who have received/will receive DOH / NHS Wales support through the NHS bursary and who have applied for a Student Loan or who intend to apply for a Loan for Maintenance}

NHSL2

Over the whole academic year, how much Student Loan for Maintenance will you receive or do you intend to apply for?

INTERVIEWER IF STUDENT NEEDS PROMPTING, THE FOLLOWING ARE THE MAXIMUM AMOUNTS THAT DIFFERENT STUDENTS CAN APPLY FOR.

READ OUT AS NECESSARY:

-Living in London - £3,100

-Living elsewhere - £2,210

PROMPT FOR STUDENTS BEST ESTIMATE IF THEY ARE UNSURE

Numeric answer: range 1 to 3,100

- XNHS/XOSTUD/XINCOME - Add amount given

3.5.5 Other allowances

{Ask students who have received/will receive DOH / NHS Wales support through the NHS bursary}

NHSOTH1

SHOWCARD O

Here is a list of other allowances or sources of funding that you may receive. Please tell me which of these you receive or expect to receive in this academic year?

CODE ALL THAT APPLY

-
- Access to Learning Funds are available through colleges to provide help for students on low income who need extra financial support (previously these were called hardship funds).
- Financial Contingency Funds in *Wales*
- In Wales Financial Contingency Funds are available through colleges to provide help for students on low income who need extra financial support (previously these were called hardship funds).
- Educational trusts and charities
- Some educational trusts and charities give other financial support to students.
- Other grants/allowances
- Any *other* grants or allowances that a student may receive from a university, college or other organisation.
- None of these – code if spontaneously mentioned

3.6 Grants and awards details – all students

3.6.1 Welsh Assembly Learning Grant

{Ask students except OU students, who ordinarily lived in Wales before the course and attend a college/uni who will receive/have received any Welsh Assembly Learning Grant }

WALP1

How much money from a Welsh Assembly Learning Grant have you received or do you expect to receive in this academic year?

You can tell me this for the whole academic year or per term?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students except OU students, who ordinarily lived in Wales before the course and attend a college/uni who will receive/have received any Welsh Assembly Learning Grant }

WALAM

CODE THE AMOUNT

Numeric answer: range 1 to 2765

- XOTHSTUD/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer given at WALP1 if year or term CODED AT WALP1

3.6.2 Disabled Students' Allowances

{Ask students who have received or expect to receive a DSA specialist equipment allowance}

EQUP1

How much have you received or will you receive for specialist equipment as part of disabled students' allowances in this academic year. You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER IF NEEDED: This may be paid directly to a supplier or provider rather than to you, but we are interested in how much is paid on your behalf in total

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who have received or expect to receive a DSA specialist equipment allowance}

EQUAM

CODE THE AMOUNT

Numeric answer: range 1 to 4905

- XDISAB/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer given at EQUIP1 if year or term is coded at EQUIP1

{Ask students who have received or expect to receive a DSA specialist equipment allowance and have given amounts weekly or monthly}

EQUP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XDISAB /XOSTUD/XINCOME - Add amount given at EQUAM multiplied by the answer given here if week is coded at EQUIP1

{Ask students who have received or expect to receive a DSA non-medical helper's allowance}

HELP1

How much have you received or will you receive as the non-medical helper's allowance part of disabled students' allowances in this academic year. You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER IF NEEDED: This may be paid directly to a supplier or provider rather than to you, but we are interested in how much is paid on your behalf in total

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who have received or expect to receive a DSA non-medical helper's allowance}

HELAM

CODE THE AMOUNT

Numeric answer: range 1 to 12420

- XDISAB/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer given at HELP1 if year or term is coded at HELP1

{Ask students who have received or expect to receive a DSA non-medical helper's allowance and have given amounts weekly or monthly}

HELP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

{Check if total amount for part-time students over the academic year is greater than £9315 "The maximum part-time students can receive for the non-medical helper's allowance is £9315. Can I check the answers I have just recorded?"}

XDISAB /XOSTUD/XINCOME - Add amount given at HELAM multiplied by the answer given here if week is coded at HELP1

{Ask students who have received or expect to receive a DSA general allowance}

GENP1

How much have you received or will you receive as the general allowance part of disabled students' allowances in this academic year. You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER IF NEEDED: This may be paid directly to a supplier or provider rather than to you, but we are interested in how much is paid on your behalf in total

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who have received or expect to receive a DSA general allowance}

GENAM

CODE THE AMOUNT

Numeric answer: range 1 to 1640

- XDISAB/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer given at GENP1 if year or term is coded at GENP1

{Ask students who have received or expect to receive a DSA general allowance and have given amounts weekly or monthly}

GENP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

{Check if total amount for part-time students over the academic year is greater than £1640 "The maximum part-time students can receive for the general allowance is £1640. Can I check the answers I have just recorded?"}

- XDISAB /XOSTUD/XINCOME - Add amount given at GENAM multiplied by the answer given here if week is coded at GENP1

{Ask students who have received or expect to receive DSA extra travel costs}

DTRP1

How much have you received or will you receive to cover extra travel costs you have to pay as a result of your disability in this academic year. You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER IF NEEDED: This may be paid directly to a supplier or provider than to you, but we are interested in how much you is paid on your behalf in total

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students who have received or expect to receive a DSA extra travel costs}

DTRAM

CODE THE AMOUNT

Numeric answer: range 1 to 50000

- XDISAB/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer given at DTRP1 if year or term is coded at DTRP1

{Ask students who have received or expect to receive DSA extra travel costs and have given amounts weekly or monthly}

DTRP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XDISAB /XOSTUD/XINCOME - Add amount given at DTRAM multiplied by the answer given here if week is coded at DTRP1

{Ask students who have received or expect to receive any DSA allowances}
DSANB1

INTERVIEWER: CODE IF DETAILS OF THE STUDENT'S DISABLED STUDENT ALLOWANCE HAVE NOT BEEN ADEQUATELY COVERED IN PREVIOUS QUESTIONS, OR THE STUDENT SAID THEY WERE NOT SURE WHICH DISABLED STUDENT ALLOWANCE THEY RECEIVE."

Details NOT adequately covered, or student unsure what DSA they receive
Detail is sufficient

{Ask if details about DSA already recorded are not sufficient}

DSANB2

INTERVIEWER WRITE IN ANY DETAILS OF THE DISABLED STUDENT ALLOWANCE THAT HAVE NOT BEEN COVERED.

Open type answer

3.6.3 Career Development Loan

{Ask students who will receive/have received any Career Development Loan}
CDLAM

How much Career Development Loan have you received or do you expect to receive over the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 8000

{Ask students who will receive/have received any Career Development Loan}
CDLP1

Is this loan to cover this academic year/course only, or does it cover a greater amount of time?

This academic year/course

Greater period of time

- XCDL/XOSTUD/XINCOME - if "This academic year/course" is answered add amount given
- XCDL/XBORR- if "This academic year/course" is answered add amount given

{Ask students who will receive/have received any Career Development Loan that covers more than the academic year/course}

CDLP2

I'd like to know what period of time this loan covers. What date did you receive this loan?

ENTER DATE LOAN WAS RECEIVED

INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.

ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.

Datatype answer

{Ask students who will receive/have received any Career Development Loan that covers more than the academic year/course}

CDLP3

Until what date should this loan last or support you?

ENTER DATE LOAN SHOULD COVER UNTIL

INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.

ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.

Datatype answer

- XCDL/XOSTUD/XINCOME

- If uni/college based student and if "Greater period of time" is answered at CDLP1 add amount given multiplied by the 9/number of months it should have covered
- If OU student and if "Greater period of time" is answered at CDLP1 add amount given multiplied by the 12/number of months it should have covered

- XCDL/XBORR

- If uni/college based student and if "Greater period of time" is answered at CDLP1 add amount given multiplied by the 9/number of months it should have covered
- If OU student and if "Greater period of time" is answered at CDLP1 add amount given multiplied by the 12/number of months it should have covered

3.6.4 Access to Learning Fund - England

{Ask all who are studying in England and who have received or expect to receive money through Access to Learning Fund (*including students receiving NHS bursary*) }

ACC1

Thinking about any support from an Access to Learning Fund. How much money have you received so far this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 3500

{Ask all who are studying in England and who have received or expect to receive money through Access to Learning (*including students receiving NHS bursary*) }

ACC2

How much money from an Access to Learning Fund, if any, do you expect to receive between now and the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 3500

{Ask all who are studying in England and who have received money through Access to Learning (*including students receiving NHS bursary*) }

ACC3

Do you eventually have to pay this money back or is it a grant that you can keep?

Need to pay money back

Can keep money

- XACCESS/XMSTUD/XINCOME - Add amount answered at ACC1 and ACC2 if "Can keep money" is answered
- XACCDEBT/XBORR - Add amount answered at ACC1 and ACC2 if "Need to pay money back" is answered

3.6.5 Financial Contingency Funds - Wales

{Ask all who are studying in Wales and who have received or expect to receive money through FCF scheme (*including students receiving NHS bursary*) }

WACC1

How much money from a Financial Contingency Scheme have you received so far this academic year? {IF OU: As an OU student you may know this form of support as the Access to Learning Fund in Wales}.

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Ask all who are studying in Wales and who have received or expect to receive money through FCF scheme (*including students receiving NHS bursary*) }

WACC2

How much, if any do you expect to receive between now and the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Ask all who are studying in Wales and who have received money through FCF scheme (*including students receiving NHS bursary*) }

WACC3

Do you eventually have to pay this money back or is it a grant that you can keep?

Need to pay money back

Can keep money

- XACCESS/XMSTUD/XINCOME - Add amount answered at WACC1 and WACC2 if "Can keep money" was answered
- XACCDEBT/XBORR - Add amount answered at WACC1 and WACC2 if "Need to pay money back" is answered

3.6.6 Socrates-Erasmus exchange programme

{Ask all who have received ERASMUS funding}

ERASAM

How much have you received or do you expect to receive for Socrates-Erasmus funding in total over the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

{Check if student receives more than £3000 a year "This seems quite high Can I just check what I have recorded?"}

- XOTHSTUD/XOSTUD/XINCOME - Add amount answered

3.6.7 Educational trusts and charities

{Ask all who have received charity/trust funding (*including students receiving NHS bursary*)}

TRSTAM

How much have you received or do you expect to receive in total over the academic year from educational trusts or charities?

IF NEEDED: Please do not include any support that you have already mentioned regarding tuition fees.

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

{Check if student receives more than £3000 a year "This seems quite high Can I just check what I have recorded?"}

- XOTHSTUD/XOSTUD/XINCOME - Add amount answered

3.6.8 Other

{Ask all who have received other non-specific HE related funding (*including students receiving NHS bursary*)}

OTHAM

How much money have you received or do you expect to receive in this academic year from any *other* grants or allowances that *have not already been mentioned*?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

INTERVIEWER: Do not record amounts received from family or friends.

{Check if student receives more than £3000 a year "This seems quite high Can I just check what I have recorded?"}

- XOTHSTUD/XOSTUD/XINCOME - Add amount answered

3.7 Total grant and awards

{Ask those who will receive some financial support and *all students receiving NHS bursary*}

SUPCHK

The laptop has worked out that you get approximately £AMOUNT in higher education student support over the academic year. Does this sound about right to you?

{SCREEN DISPLAYS LIST OF GRANTS/AWARDS RECEIVED ALONG WITH AMOUNT RECEIVED AND CAPI QUESTION NAME}

Yes

No

{Check if answer is "no" "(INTERVIEWER TO GO BACK THROUGH AMOUNTS OF STUDENT SUPPORT RECEIVED) Which of these amounts of student support doesn't seem correct to you?" Interviewer go back and make any necessary amends}

3.8 Employer support/sponsorship

{Ask all (including students receiving NHS bursary) }

EMPSUP

SHOWCARD Q

I'm now going to ask about support you may have received from employers. Have you received any of the following types of support. If yes, which ones?

CODE ALL THAT APPLY

Secondment (being sent to work somewhere else temporarily, either to increase the number of workers, to replace other workers, or to exchange experience or skills)

Extra financial support (not including tuition fee support or earnings) e.g. money for books

Flexible working hours

Paid time off to study, including taking exams and attending day or residential schools

Unpaid time off to study, including taking exams and attending day or residential schools

Other type of support

No employer support

{Ask those who have been given extra financial support from an employer (including students receiving NHS bursary) }

EMPLP1

And how much money have you received or do you expect to receive from your employer in this academic year - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. Note that we are not talking about tuition fee support or earnings.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask those who have been given financial support from an employer (including students receiving NHS bursary) }

EMPLAM

CODE THE AMOUNT

Numeric answer: range 1 to 10000

- XEMPL/XOSTUD/XINCOME - Add amount given multiplied by the time period multiplier for answer given at EMPLP1 if year or term CODED AT EMPLP1

{Ask those who have been given financial support from an employer and given the amount monthly or weekly (including students receiving NHS bursary) }

EMPLP2

How many (weeks/months) do you receive this per year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE LENGTH OF TIME PERIOD

Numeric answer: range 1 to 52

- XEMPL/XOSTUD/XINCOME - Add amount given at EMPLAM multiplied by the answer given here if week is coded at EMPLP1

{Ask if student gets paid time off to study (including students receiving NHS bursary)}

PAIDP

On average, how much *paid* time off work does your employer give you to study, including taking exams and attending day or residential schools - you can tell me how many hours or days per week or month?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR AMOUNT RECEIVED

Hours a week

Hours a month

Days a week

Days a month

{Ask if student gets paid time off to study (*including students receiving NHS bursary*)}

PAIDAM

RECORD THE AMOUNT OF TIME

Numeric answer: range 0 to 300

{Ask if student gets unpaid time off to study (*including students receiving NHS bursary*) }

UNP

On average, how much *unpaid* time off work does your employer give you to study , including taking exams and attending day or residential schools - you can tell me how many hours or days per week or month?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR AMOUNT RECEIVED

Hours a week

Hours a month

Days a week

Days a month

{Ask if student gets unpaid time off to study (*including students receiving NHS bursary*) }

UNPAM

RECORD THE AMOUNT OF TIME

Numeric answer: range 0 to 300

4 STUDENT'S CHOICES AND STUDENT SUPPORT

4.1 Student support and decisions about studying

{Ask all}

Intro

I'm now going to ask you about your decisions to study and any previous Student Loans.

Continue

{Ask all}

DEC

Did the student funding and support available to you affect your decisions about study in any way?

Yes

No

{Ask all who say that funding and financial support affected their decision to study}

DECWH

SHOWCARD R

From this showcard tell me in what ways did the support available affect your decisions about studying?

CODE ALL THAT APPLY

It affected my decision to study full-time or part-time

It affected my decision of whether to study at a nearby university so I could live with my family rather than going to a different university where I would have to live independently

It affected my decision to study in England or Wales

It affected my decision to study in London or not

It affected my decision about what course to take

It affected my decision about what institution to attend

I would not have studied without funding

None of these

{Ask all who say that funding and financial support affected their decision to study}

DECPAR1

Did the availability of any *particular* student funding or support affect your decisions about study in any way?

Yes

No

{Ask students for whom a particular type of student funding affected their decision}

DECPAR2

Which funding was that?

CODE ALL THAT APPLY

Access to Learning Fund England

Additional Fee Support Scheme

Adult Dependants' Grant

Bursaries from your college or university in England

Career Development Loan

Childcare Grant

Course Grant (part-time)

Disabled Students' Allowances

Educational trusts and charities

Extra travel costs related to the course

Financial Contingency Funds- Wales

Higher Education Grant

Maintenance Grant

NHS Bursary

Parents' Learning Allowance

Scholarships from your college or university

Socrates-Erasmus exchange programme

Open University Student Assistance Fund

Open University Crowther Fund

Open University Computer or Internet grant

Special Support Grant

Student Loan for Maintenance

Student Loan for Fees

Student Loan/extra weeks allowance

Teacher Training related funds- England

Teacher Training related funds- Wales

Tuition Fee Grant

Welsh Assembly Learning Grant

Welsh Bursary Scheme

Other

{Ask all}

DECT

And did the cost of the tuition fees at your university or college affect your decisions about study in any way?

Yes

No

{Ask all who say that cost of tuition fees affected their decision to study}

DECTU

SHOWCARD R

From this showcard tell me in what ways did the cost of the tuition fees at your university or college affect your decisions about studying?

CODE ALL THAT APPLY

It affected my decision to study full-time or part-time

It affected my decision of whether to study at a nearby university so I could live with my family rather than going to a different university where I would have to live independently

It affected my decision to study in England or Wales

It affected my decision to study in London or not

It affected my decision about what course to take

It affected my decision about what institution to attend

I would not have studied without funding

None of these

4.2 Debts from previous loans

{Ask all}

OLDLOAN

At the start of this academic year, did you have any loans outstanding from the Student Loans Company - this could have been loans for fees or maintenance, but please do not include any loans taken out but paid back before the start of the academic year.

Yes

No

Check if full-time and 2nd year or higher if says no to this question. "Can I just double-check that you have not taken out any Student Loans for Fees or Maintenance before this academic year for your current course (that you have not already paid back)?"

INTERVIEWER: IF THIS IS THE CASE, SUPPRESS CHECK AND CONTINUE, OTHERWISE CHANGE ANSWER AT OLDLOAN."

{Ask students who have outstanding Student Loan debts}

OldLAM1

How much had you borrowed in total from the Student Loans Company before the start of this academic year that is DATE?

0..30000

{Check if above £10,000: This seems quite high. Can I just check what I have recorded?}

{Ask if OLDLAM1>0}

OldLAM2

How much, if any, had you paid back of this amount before the start of this academic year that is DATE

0..30000

- XSTUDEBT/XBORR - Add amount given at OLDLAM1 minus the amount given at OLDLAM2

5 OTHER INCOME

5.1 Earnings

{All}
CASH

I'd now like to ask you about any earnings from paid work. This includes any money from a full or part-time job and money you may have earned however casually or occasionally. Have you received any earnings from paid work since the start of the academic year, that is since DATE?

Yes
No

5.1.1 Continuous work

{All who have done any paid work in the academic year}
JOB

Have you got a job that you have had since at least the start of this academic year, that is since DATE, that you expect to continue until the end of this academic year, that is DATE? We mean a regular job where you work weekly (IF NOT PART-TIME STUDENT: and you have been doing this job in term-time and vacations)?

Yes
No

{All who have had a continuous job}
JOBHR1

Do you work the same number of hours in term time and vacations or a different number of hours - please think about the Easter and Christmas vacations only as we will ask about the summer vacation separately?

Same
Different

{All who have had a continuous job}
JOBHRT

For approximately how many hours do you do this job each week (IF DOES A DIFFERENT AMOUNT OF HOURS IN TERM VS VACATIONS: in term time)?
INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 70

{All who have had a continuous job and work different hours in term time}
JOBHRV

For approximately how many hours do you do this job each week in vacations?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 70

{All who have had a continuous job}
JOBAMT

How much do you earn from this job (IF DOES A DIFFERENT AMOUNT OF HOURS IN TERM VS VACATIONS in term-time) after all deductions including tax, national insurance and so on. You can tell me the amount per week or per calendar month?

RECORD THE TIME PERIOD FOR AMOUNT EARNED

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{All who have had a continuous job}

JOBPT

RECORD THE AMOUNT EARNED

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 50000

{Check if student receives more than £800 a week. "This seems quite high. Can I just check what I have recorded?"}

- XPJOB/XWORKXV/XINCOME
- If student works the same hours in terms and vacations (JOBHR1=same) , add answer given multiplied by the time period multiplier for answer given at JOBAMT
- If student works different hours in terms and vacations (JOBHR1=Different)
 - Add amount given multiplied by 30 if WEEK is coded at JOBAMT (because 30 is the approximate number of weeks of vacation across the academic year)
 - Add amount given multiplied by 7 if MONTH is coded at JOBAMT (because 7 is the approximate number of months of term-time across the academic year)
 - Add amount given if YEAR is coded at JOBAMT

{All who have had a continuous job and work different hours in term time }

JOBAMV

How much do you earn from this job in holidays after all deductions including tax, national insurance and so on. You can tell me the amount per week or per calendar month?

RECORD THE TIME PERIOD FOR AMOUNT EARNED

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{All who have had a continuous job}

JOBPV

RECORD THE AMOUNT EARNED

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 50000

{Check if student receives more than £800 a week. "This seems quite high. Can I just check what I have recorded?"}

- XPJOB/XWORKXV/XINCOME
 - Add amount given multiplied by 8 IF WEEK is coded at JOBAMV (because 8 is the approximate number of weeks of vacation across the academic year)
 - Add amount given multiplied by 2 IF MONTH is coded at JOBAMV (because 2 is the approximate number of months off vacation across the academic year)
 - Add amount given IF YEAR is coded at JOBAMV

5.1.2 *Non-continuous/other work*

{All who have done any paid work in the academic year}

WRK

(Excluding the continuous job you have already told me about) how many (other) jobs or different types of paid work have you earned from in the academic year, that is since DATE (IF NOT OU: ,please include jobs in term-time and vacations)?

INTERVIEWER: EACH TYPE WILL BE ASKED ABOUT IN DEPTH SO RECORD VERY DIFFERENT JOBS SEPARATELY, BUT CASUAL WORK AS ONE ENTRY (EG. ENTER BABYSITTING AS ONE TYPE OF WORK, RATHER THAN SPLITTING OUT INTO 3 BABYSITTING JOBS IF THEY SIT FOR 3 FAMILIES.

INTERVIEWER USE DATES TO HELP STUDENT WORK THIS OUT IF NEEDED.

AUTUMN TERM: DATE to DATE

SPRING TERM: DATE to DATE

Numeric; range 0 to 8

{Ask if student earns money through non-continuous work. Repeat until each job has been entered}

JDET

Thinking of your (first/second etc) job, please tell me what to call this job or type of employment so I can ask about your earnings from it?

INTERVIEWER: WRITE IN NAME OF EACH JOB

INTERVIEWER, E.G. WEEKEND BAR WORK, CASHIER IN SHOP,
FACTORY WORK

String answer

5.1.3 *Payment from each job/employment*

{Repeat for each job/employment student has}

JST

Did you start this (NAME OF WORK) job before the start of the academic year?

Yes

No

{Repeat for each job/employment student has, if they started after the start of the academic year}

JSTDAT

When did you start this (NAME OF WORK) work?

INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.

ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.

E.G.

IF IN AUTUMN TERM CODE OCTOBER

IF IN CHRISTMAS HOLIDAYS CODE DECEMBER

IF IN SPRING TERM CODE FEBRUARY

IF IN EASTER VACATION CODE APRIL

IF IN SUMMER TERM CODE JUNE

Datatype answer

{Repeat for each job/employment student has}

JFN

Do you expect this (NAME OF WORK) work to carry on at least until the end of the academic year, that is DATE?

Yes

No

{Repeat for each job/employment student has, if it not expected to last until the end of the academic year}

JFN DAT

When did the employment end or when do you expect this (NAME OF WORK) work to end?

INTERVIEWER ENTER 01 FOR DAY IF THIS IS NOT KNOWN.

ENCOURAGE APPROXIMATE ANSWER IF STUDENT IS NOT SURE.

IF EMPLOYMENT WILL LAST UNTIL AFTER THE END OF THE ACADEMIC YEAR, CODE DATE

Datatype answer

{Repeat for each job/employment student has}

JHRR

For approximately how many hours do you do this (NAME OF WORK) job - you can tell me the number of hours per week, per calendar month or per vacation??

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR HOURS WORKED

Academic year/course

Term

Vacation

Month

4 weeks

Week

{Repeat for each job/employment student has}

JHRP

RECORD THE HOURS WORKED

Numeric answer: range 1 to 70

{Check if student works more than 48 hours a week. "This seems quite high. Can I just check what I have recorded?"}

{Repeat for each job/employment student has}

JSAL

How much do you earn from this job after all deductions including tax, national insurance and so on, but including any tips you may receive. You can tell me the total amount since the beginning of the academic year that is DATE, or the amount per calendar month or week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR AMOUNT EARNED

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Repeat for each job/employment student has}

JSALP

RECORD THE AMOUNT EARNED

Numeric answer: range 1 to 50000

{Check if student receives more than £800 a week. "This seems quite high. Can I just check what I have recorded?"}

- XOTHJXV/XWORKXV/XINCOME
- If student started the job before the start of the academic year and expected it to carry on until after the end of the academic year (JST=Yes and JFN=Yes) , add amount multiplied by the time period multiplier multiplied by 6/9 for answer given at JSAL
- If student had not started this job before the start of the academic year or expected it to carry on until after the end of the academic year (JST=No or JFN=No) we need to work out the number of days within the academic year (for OU students between 01/08/2004 to 31/07/05 and for university based/college based students from 04/10/04 to 01/07/2005)
 - Add amount given multiplied by 1 if academic year is coded at JSAL
 - Add amount given multiplied by number of months (31 days) worked if month is coded at JSAL
 - Add amount given multiplied by the number of weeks (7 days) worked if week is coded at JSAL

5.1.4 Summer 2007 vacation work

{Ask all students except OU students}

VACS

Did you do any paid work over last summer vacation, that is between DATE and DATE?

Yes

No

{Ask students in second year and above, except OU students, who worked in the summer vacation}

VACSWK

For approximately how many weeks did you work?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 25

{Check if above 16 weeks "The summer vacation usually last for 16 weeks or less. Can I check the number you gave me"}

{Ask students in second year and above, except OU students, who worked in the summer vacation}

VACSHRP

And for how many hours did you do this job - you can tell me the number of hours per week, per calendar month or the total over the vacation?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR HOURS WORKED

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Repeat for each job/employment student has}

VACSHRA

RECORD THE HOURS WORKED

Numeric answer: range 1 to 1120

{Checks for high or low amounts}

{Ask students in second year and above, except OU students, who worked in the Summer vacation}

VACSPER

How much did you earn from this work after all deductions including tax, national insurance and so on, but including any tips you may receive . You can tell me the amount over the entire vacation, per calendar month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR AMOUNT EARNED

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students in second year and above, except OU students, who worked in the Summer vacation}

VACSAM

CODE THE AMOUNT EARNED

Numeric answer: range 0 to 15000

{Check if student receives more than £800 a week. "This seems quite high. Can I just check what I have recorded?"}

- XOTHJOB/XWORK/XINCWSV
- Add amount given multiplied by 1 if Academic year, term, quarter, or vacation is coded at VACSPER
- Add amount given multiplied by the number of months (31 days) worked if month or 4 weeks is coded at VACSPER
- Add amount given multiplied by the number of weeks (7 days) worked if week is coded at VACSPER

5.1.5 Earnings in the rest of the academic year

{Ask all}

JOBFUT

Excluding all of the jobs you have already told me about, do you expect to have any other jobs between now and the end of the academic year, that is DATE, including term times and vacations?

Yes

No

{If expect to have more jobs}

JOBFUTAM

How much do you expect to earn from these other jobs between now and the end of the academic year, thinking about both term time and vacations - please tell me after all deductions including tax, national insurance and so on? INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR AMOUNT EARNED

Numeric answer: range 0 to 10000

5.1.6 Effect of work on studies

{Ask all who have done any paid work in the academic year}

WORK1

Has your paid work affected your course work, studies or time (at university/college/ or through Open University) in any way?

Yes

No

{Ask all who have done any paid work in the academic year who think it has affected their studies}

{C. Callender statements}

WORK3

SHOWCARD S

In which ways have your university work and studies been affected by your paid work?

PROBE: Which others?

CODE ALL THAT APPLY

Less worry about finance so more relaxed in study

Cannot spend enough time on university work therefore reduces quality of my work

Missing lectures and classes

Less time studying and reading

Less time to revise for exams

More difficulty accessing university library and computers

Less time sleeping

Increased levels of stress/overload

Less time for leisure and sports

Other (Specify)

None of these

Ask all who have done any paid work in the academic year who think it has affected their studies and who answer other to WORK3}

WORK3SP

WRITE IN WAY WORK HAS AFFECTED STUDIES

Open answer

5.2 Benefits

{Ask all}

SHOWCARD T

BEN1

I'm now going to ask you about social security benefits.

During this academic year, have you received or do you expect to receive any of these benefits or allowances in your own right (IF MARRIED/LIVING WITH PARTNER or in your partner's name)?

DO NOT RECORD COUNCIL TAX BENEFIT UNDER 'Other' THIS WILL BE ASKED ABOUT SEPARATELY

Child Benefit

Child Tax Credit

Retirement Pension or Widow's pension

Pension Credit

Carer's Allowance (previously Invalid Care Allowance)

Any disability/invalidity/incapacity/sickness benefit

Working Tax Credit

Job Seeker's Allowance (JSA) / Other unemployment benefits

Income Support

Housing Benefit

Local Housing Allowance

Other state benefits (specify)

None of these

{Ask all who said "other" benefits}

BEN2

WRITE IN BENEFIT VERBATIM

Open answer

{Ask set of benefit questions for each benefit claimed}

BENST

When did you start receiving (BENEFIT) - was it... READ OUT

Before the start of academic year

during the academic year

or have you not started receiving it?

INTERVIEWER: if benefit received on more than one occasion, ask about when the current period started

{Ask all receiving each benefit if the benefit started before the start of the academic year}

BENCONT

Will this (BENEFIT) be paid continuously throughout this academic year?

Yes

No

{Ask all receiving each benefit if the benefit started after the start of the academic year or if it will not be paid continuously throughout the academic year}

BENP

For how many weeks so far in this academic year have you received (BENEFIT)?

INTERVIEWER: ENTER TOTAL NUMBER OF WEEKS EVEN IF NOT CONTINUOUS

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 42

{Ask all receiving each benefit if it will not be paid continuously throughout the academic year or if they have not started receiving it yet}

BENF

And for how many of the weeks remaining in the academic year do you expect to receive this benefit ?

INTERVIEWER: ENTER TOTAL NUMBER OF WEEKS EVEN IF NOT CONTINUOUS

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 42

{Check if total number of weeks that they claim to be receiving (BENEFIT) is over 42 weeks. "A lot of academic years and courses last around 42 weeks, can I just check the number I have entered for how many weeks you have already received this benefit and how many weeks you expect to receive this benefit this academic year."}

{Ask all receiving a benefit. Repeat for each benefit}

BENAM

How much (BENEFIT) do you or did you receive each week (FOR INCOME SUPPORT excluding mortgage interest payments)?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 8000

- XBENS/XINCOME

- If student has received the benefit since before the start of term and expects to receive it constantly throughout the year (BENST=Bfore and BENCONT=Yes) - add amount answered multiplied by 39 if a college based student, or multiplied by 52 if an OU student (approx number of weeks in the academic year for each)

If student hasn't received the benefit since before the start of term or doesn't expect to receive it constantly throughout the year (BENST=During or BENST=notyet or BENCONT=No) - add amount answered multiplied by the sum of answers given at BENP and BENF

{Ask students with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children}

SCHMEAL

Do/does your child/your children receive free school meals?

Yes

No

5.3 Spouse's income/benefits

{Ask students who are married or live with a partner}

PARACT

SHOWCARD U

I would now like to ask a little about your spouse/partner. From the answers on this card how would you describe your spouse's/partner's *main* activity?

CODE ONE ONLY

Paid employment

Self-employment

Unemployed and seeking work

Full-time education

On a government scheme for employment training

Voluntary work

Temporarily sick/disabled

Permanently sick/disabled

Looking after home/family

Wholly retired

Other

{Ask students who are married or live with a partner}

PARAM

What is your spouse's/partner's total income - by income we mean income from all sources, including earnings from employment, pensions, gifts of money, benefits in his/her name and so on. But, please don't include any benefits that are shared that you have already told me about. You can tell me his/her income either gross, that is before tax and deductions, or net, that is after deductions for tax and national insurance. And you can also tell me his/her income per week, per month or their annual income?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 80000

{Ask students who are married or live with a partner who have given a figure for their partners' income}

PARNET1

SPECIFY GROSS OR NET

Gross

Net

{Ask students who are married or live with a partner who have given a figure for partners' income}

PARPER1

SPECIFY TIME PERIOD

Week

4 weekly

Month

Annual

- XPARTINC

- If income is given as a net figure, add amount answered at PARAM multiplied by the time multiplier at parper1

- If income is given as a gross figure, add amount answered at PARAM multiplied by the time multiplier for parper1 and multiplied by 0.70

Where the time multipliers for parper1 are:

Week Uni/college= 39 OU= 52

4 weekly Uni/college= 10 OU= 13

Month Uni/college= 9 OU= 12

Annual Uni/college= 9/12 OU= 1

{Ask students who are married or live with a partner who HAVEN'T given a figure for partners' income}

PARAM2

SHOWCARD V

Could you tell me into which of these bands your spouse's/partner's total annual income falls - you can tell me the amount either gross, that is before tax and deductions, or net, that is after tax and deductions?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

- A. up to £5,000
- B. £5,001 to £10,000
- C. £10,001 to £15,000
- D. £15,001 to £20,000
- E. £20,001 to £25,000
- F. £25,001 to £30,000
- G. £30,001 to £40,000
- H. £40,001 to £50,000
- I. £50,001 or more

{Ask students who are married or live with a partner who have given a banded figure for partners' income}

PARNET2

SPECIFY GROSS OR NET

Gross

Net

- **XPARTINC**
- If income is given as a net figure, add midpoint of amount answered at **PARAM2**
- If income is given as a gross figure, add midpoint of amount answered at **PARAM2** multiplied by 0.70

7.2 Maintenance

{Ask all}

MAINT1

Do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your partner) make any regular payments for maintenance for a *former* partner (TEXFILL and/or children) who are not living with you?

Yes

No

{Ask if student or student's partner makes maintenance payments}

MAINT2

What is the amount that you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your partner) pay - you can tell me weekly, monthly or over a year?

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask if student or student's partner makes maintenance payments}

MAINTAM

RECORD THE AMOUNT

Numeric: Range 1 to 50000

- **XOTHLIV/XOTHLIVT/XLIVING/XSPEND** - add amount answered time period multiplier for answer given MAINT2

5.4 Money and gifts

{To all}

MonGif

.Now I would like to ask you about any money or gifts which you receive from your parents or other relatives, friends or organisations But please do not mention money that you have already told me about (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and do not include any money given to you by your spouse/partner)?

{Ask all}

RENT

Firstly, during this academic year have you received or do you expect to receive any contributions of money to help pay for your *rent or mortgage*, these may be given to you or paid directly on your behalf?

Yes

No

{Ask all}

LIV

And have you received or do you expect to receive any other contributions of money to help support you and pay for your *living costs and bills* while you are a student?

Yes

No

{Ask all}

GIFT

(And during this academic year have you received or do you expect to receive) any *gifts of money*, including Christmas and other religious festivals or birthday gifts of money?

Yes

No

{Ask all}

KIND

(And during this academic year have you received or do you expect to receive) any *gifts in kind* such as food, clothes, household goods and furniture. Please include purchases charged to someone else's credit card/charge card and clothes for Christmas and presents.

Do not include computers, books and equipment needed for your course, as I will ask about these separately?

Yes

No

{Ask all}

INFL

(And have you received or do you expect to receive) any *informal loans* from family or friends?

Yes

No

5.4.1 Rent

{Ask if the student receives or expects to receive contributions of money towards rent}

RENTWHOP

SHOWCARD **W**

So far this academic year, from whom, if anyone, have you received contributions of money towards your *rent* - please remember to include all regular payments given directly to you for rent however small they may be. Also please include money given to you just before the start of the academic year, for you to use during the academic year. (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER Remember to exclude contributions from your spouse/partner)?

CODE ALL THAT APPLY

Parents/Step-parents

Other relatives

Other non-relatives

Organisation

Employer

No contributions so far

{Ask for each person/organisations from whom money towards rent has been received}

RENTAMP

So far during this academic year, how much have you received as contributions of money from (PERSON/ORGANISATION) for your rent?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XPARENTS/XFAMILY/XINCOME If contribution from parents/Step-parents – add amount answered
- XRELS/XFAMILY/XINCOME If contribution from other relatives– add amount answered
- XNON/XFAMILY/XINCOME If contribution from other non-relatives– add amount answered
- XOTHINC/XINCOME If contribution from organisation– add amount answered

{Ask if the student receives or expects to receive contributions towards rent}

RENTWHOF

SHOWCARD **X**

And from now until the end of the academic year, from whom, if anyone, do you expect to receive any (more) money as contribution towards your rent? (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER Remember to exclude contributions from your spouse/partner)?

CODE ALL THAT APPLY

Parents/Step-parents

Other relatives

Other non-relative

Organisation

Employer

No more contributions expected

{Ask for each person/organisations from whom contributions towards rent will be received}

RENTAMF

How much do you expect to receive as contributions towards your rent from (PERSON/ORGANISATION) for the remainder of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XPARENTS/XFAMILY/XINCOME If contribution from parents/Step-parents – add amount answered
- XRELS/XFAMILY/XINCOME If contribution from other relatives– add amount answered
- XNON/XFAMILY/XINCOME If contribution from other non-relatives– add amount answered
- XOTHINC/XINCOME If contribution from organisation– add amount answered

5.4.2 Living costs

{Ask if the student receives or expects to receive contributions of money towards living costs}

LIVWHOP

SHOWCARD **W**

So far this academic year, from whom, if anyone, have you received contributions of money towards *living costs and bills* - please remember to include all regular payments given directly to you however small they may be. Also please include money given to you just before the start of the academic year, for you to use during the academic year. (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER Remember to exclude contributions from your spouse/partner)?

CODE ALL THAT APPLY

Parents/Step-parents

Other relatives

Other non-relatives

Organisation

Employer

No contributions so far

{Ask for each person/organisations from whom contributions of money towards living costs has been received}

LIVAMP

So far during this academic year, how much have you received as contributions of money for living costs and bills from (PERSON/ORGANISATION)?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XPARENTS/XFAMILY/XINCOME If contribution from parents/Step-parents – add amount answered
- XRELS/XFAMILY/XINCOME If contribution from other relatives– add amount answered
- XNON/XFAMILY/XINCOME If contribution from other non-relatives– add amount answered
- XOTHINC/XINCOME If contribution from organisation– add amount answered

{Ask if the student receives or expects to receive contributions of money towards living costs}

LIVWHOF

SHOWCARD X

And from now until the end of the academic year, from whom, if anyone, do you expect to receive any (more) money as a regular contribution towards your living costs and bills? (IF MARRIED OR HAS SHARED FINANCIAL

RESPONSIBILITY WITH A PARTNER Remember to exclude contributions from your spouse/partner)?

CODE ALL THAT APPLY

Parents/Step-parents

Other relatives

Other non-relatives

Organisation

Employer

No more contributions expected

{Ask for each person/organisations from whom contributions towards living costs and bills will be received}

LIVAMF

How much do you expect to receive as contributions towards living costs and bills from (PERSON/ORGANISATION) for the remainder of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XPARENTS/XFAMILY/XINCOME If contribution from parents/Step-parents – add amount answered
- XRELS/XFAMILY/XINCOME If contribution from other relatives– add amount answered
- XNON/XFAMILY/XINCOME If contribution from other non-relatives– add amount answered
- XOTHINC/XINCOME If contribution from organisation– add amount answered

5.4.3 Gifts

{Ask if student receives or expects to receive gifts}

GIFWH

SHOWCARD Y

So far this academic year, from whom, if anyone, have you received (other) *gifts of money* - please remember to include money given as gifts at Christmas, other religious festivals or for your birthday, and all money given by your parents/step-parents or others as one-off gifts, however small. (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: Remember to exclude contributions from your spouse/partner)?

CODE ALL THAT APPLY

Parents/Step-parents

Other relatives

Other non-relatives

Organisation

Employer

No occasional gifts so far

{Ask if student receives gifts. Ask for each person/organisation they have received occasional gifts from}

GIFAM

So far during this academic year, that is since DATE, how much have you received as gifts of money from (PERSON/ ORGANISATION) - please include gifts and one-off payments of any size?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XPARENTS/XFAMILY/XINCOME If contribution from parents/Step-parents – add amount answered
- XRELS/XFAMILY/XINCOME If contribution from other relatives– add amount answered
- XNON/XFAMILY/XINCOME If contribution from other non-relatives– add amount answered
- XOTHINC/XINCOME If contribution from organisation– add amount answered

{Ask if student receives or expects to receive gifts}

GIFWHOF

SHOWCARD Z

And from now until the end of the academic year, from whom, if anyone, do you expect to receive gifts or one-off payments of money - please remember to include all gifts including birthday or other presents and one-off or occasional payments you receive as money. (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: Remember to exclude contributions from your spouse/partner)?

CODE ALL THAT APPLY

Parents/Step-parents

Other relatives

Other non-relatives

Organisation

Employer

No further occasional gifts expected

{Ask if student receives gifts. Ask for each person/organisation they expect to receive occasional gifts from}

GIFAMF

How much do you expect to receive as gifts, one-off or occasional payments of money from (PERSON/ORGANISATION) for the remainder of the academic year? (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER Remember to exclude contributions from your spouse/partner)?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XPARENTS/XFAMILY/XINCOME If contribution from parents/Step-parents – add amount answered
- XRELS/XFAMILY/XINCOME If contribution from other relatives– add amount answered
- XNON/XFAMILY/XINCOME If contribution from other non-relatives– add amount answered
- XOTHINC/XINCOME If contribution from organisation– add amount answered

5.4.4 Gifts in kind

{Ask if the student receives or expects to receive gifts in kind}

GIFTP

SHOWCARD AA

Since the beginning of the academic year that is since DATE have you received any gifts or presents, such as those shown on the card, worth more than £50. Include Christmas gifts or items which you paid for yourself but charged to someone else's charge or credit card. Please exclude any course-related books or equipment, (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: contributions from your spouse/partner) or any gifts of money which you have already told me about. You can just tell me yes or no.

Yes

No

Showcard content:

Clothes or shoes
Non-course books
Car/motorcycle/bike
Furniture/furnishings e.g. duvets/curtains
Glasses/contact lenses
TV/radio/hi-fi/CD/iPod/musical equipment
Sports equipment
Anything else worth more than £50

{If student has received gifts in kind since the start of the academic year}

GIFTPWH

Who gave you these gifts?

CODE ALL THAT APPLY - DO NOT INCLUDE SPOUSE OR PARTNER

Parents/Step-parents

Other relatives

Other non-relatives

{If student has received gifts in kind since the start of the academic year. Ask for each type of person who has given a gift in kind}

GIFTPAM

What is the approximate total value of the gifts you have received from (PERSON)?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 51 to 10000

- **XGIFTS/XFAMILY/XINCOME** - add amounts answered

{Ask if the student receives or expects to receive gifts in kind}

GIFTF

Is it likely that you will receive any gifts worth more than £50 between now and the end of the academic year? (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: Remember to exclude contributions from your spouse/partner)

Yes

No

{Ask if gifts in kind are likely in the rest of the academic year}

GIFTFWH

Who will give you these gifts in kind?

CODE ALL THAT APPLY - DO NOT INCLUDE SPOUSE OR PARTNER

Parents/Step-parents

Other relatives

Other non-relatives

{Ask if gifts in kind are likely in the rest of the academic year. Ask for each person who will give a gift in kind}

GIFTFAM

How much are these gifts from (PERSON) likely to be worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 51 to 10000

- **XGIFTS/XFAMILY/XINCOME** - add amounts answered

5.4.5 Informal loans

{Ask if student receives or expects to receive informal loans}

INFLP

Since the beginning of this academic year, have you received any *informal loans* of £100 or more from parents, friends or other relations?

Yes

No

{Ask if student has received informal loans since the start of the academic year}

INFLPAM

In total, how much do you currently owe on this loan/these loans?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 20000

- **Not added to figures for borrowing, instead answer to INFLAM is included**

{Ask if student receives or expects to receive informal loans}

INFLF

And between now and the end of this academic year, do you expect to receive any (more) informal loans of £100 or more from parents, friends or relations?

Yes

No

{Ask if student expects to receive informal loans in the rest of the academic year}

INFLFAM

How much do you expect to owe in informal loans at the end of this academic year, in total?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 20000

- XINFLOAN/XBORR – add amount given at answered

5.5 Savings

{Ask all}

SAV

We would now like to find out about your savings. By this we mean money that you have put aside. This might be kept in a savings account in a bank, in a building society account, in ISAs, or be money in your current account that you do not intend to spend. (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER Please remember to include your spouse's/partner's savings as well as your own)?

Continue

{Ask second year students and above}

SAVEL

At the end of *last* academic year, that is at DATE, what savings, if any, did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) have?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 80000

{Ask all}

SAVEB

At the beginning of *this* academic year, what was the total level of your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner's) savings, if any?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 80000

{Ask all}

SAVEE

By the end of this academic year, what do you expect your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner's) total level of savings will be?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 80000

- XSAVE add answer given (divide this by two if student is married or shares financial responsibility with a partner)

5.6 Miscellaneous income

5.6.1 Maintenance payments

{Ask students with children (either living with or not with the student). Also ask to students who are married or share financial responsibility with a partner if the partner has children (either living with or not with them)}

MAINT

The next set of questions are about maintenance payments.

Are you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) currently receiving any maintenance payments from a former spouse or partner, either as support for you personally or for your children?

INTERVIEWER: INCLUDE ANY INFORMAL ARRANGEMENTS

Yes

No

{Ask if student or partner/spouse receives maintenance payments}

MAINAM1

How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) received so far this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 30000

- XOTHINC/XINCOME add answer given (divide this by two if student is married or shares financial responsibility with a partner)

{Ask if student or partner/spouse receives maintenance payments}

MAINAM2

How much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) expect to receive between now and the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 30000

- XOTHINC/XINCOME add answer given (divide this by two if student is married or shares financial responsibility with a partner)

5.6.2 Other miscellaneous income

{Ask all}

MISCAC

SHOWCARD **BB**

Apart from the things that we have already talked about, have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) received, or do you expect to receive, any money generated from any other sources *during this academic year*, for example from any of the ones listed on this card. If so which ones?

CODE ALL THAT APPLY

Pension

Trusts

Deed of Covenant

Shares (including PEPs, TESSAs and Unit Trusts)

Tax refund

Interest from bank and building society accounts

Windfalls from building society mergers/ takeovers/ flotations

Other (specify)

None of these

{Ask if "other" source of income is coded}

MISCACSP

WRITE IN SOURCE

Open answer

{Repeat for each source of miscellaneous income mentioned}

MISCAM

How much, if anything, have you received or will you receive from (SOURCE) during this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 30000

- XOTHINC/XINCOME add answer given (divide this by two if student is married or shares financial responsibility with a partner)

{Ask all}

MISCSUM

Aside from everything else we've mentioned, that is money or gifts you receive from your family or other individuals, do you expect anyone, for example your parents, to make any additional payments to you *after the end* of the academic year, that is DATE, for example to pay off any outstanding debt you may have - please do not include money towards books for your course, or payment for maintenance during the vacation?

Yes

No

{Ask if student expects to receive money after the end of the summer term}

MISCSAM

How much do you think you will receive after the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

6 COMMERCIAL CREDIT/OVERDRAFT

6.1 Overdrafts

{Ask all}

Intro

I will now ask you about any overdraft you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your partner) may have had in this academic year.

Continue

{Ask all}

ODB

At the beginning of this academic year, by how much, if at all, were you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) overdrawn on a bank or building society account?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

INTERVIEWER: If no overdraft, enter zero.

Numeric answer: range 0 to 30000

{Ask all}

ODE

By how much, if at all, do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) expect to be overdrawn in total at the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 30000

- XOD/XBORR add answer given

6.2 Commercial loans

{Ask all}

COM

Now I would like to talk about credit cards and loans.

Do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) have any outstanding loans, for example from banks or other financial institutions, for which you are making repayments.

But please exclude any bank overdrafts, mortgages and any loans from the Student Loans Company as we have already covered these and any credit or hire purchase agreements which we will cover in a minute?

Yes

No

{Ask students who have a commercial loan}

COMNUM

How many outstanding loans of this type do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) have?

Remember to exclude any bank overdraft we have already discussed, and any mortgages you may have, any loans from the Student Loans Company and any Career Development Loan?

Numeric answer: range 1 to 10

{Repeat for each commercial loan student has}

COMAM

Thinking of the (first/second etc) loan, at the start of this academic year, how much did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) owe on this loan?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

{Repeat for each commercial loan student has}

COMAC

Thinking of the (first/second etc) loan, how much money have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) paid in repayments so far this academic year? INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

{Check if student has paid off more than £4000 already this year "This seems quite high.

Can I just check what I have recorded?"}

{Repeat for each commercial loan student has}

COMEND

And how much more money do you expect to pay on repayments between now and the end of this academic year on the (first/second etc) loan?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

{Check if student expects to pay off more than £4000 in the rest of the year "This seems quite high. Can I just check what I have recorded?"}

{Repeat for each commercial loan student has}

COMDT

How much will you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) still owe on this loan, after you have paid these repayments at the end of this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

- XCREDIT/XBORR add answer given

6.3 Credit/store cards

{Ask all}

CC

Do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) have any credit cards such as MasterCard or Visa or store cards?

Yes

No

{Ask those with a credit card}

CCACS

At the start of this academic year, did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your partner) have any outstanding balances owing on credit or store cards - by outstanding balances I mean balances held over from the previous month?

Yes

No

{Ask those with a credit card with outstanding balances at the start of this academic year}

CCACSAM

What was the amount outstanding at the start of this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

{Ask those with a credit card}

CCEND

And do you expect to have any outstanding balances at the end of this academic year?

Yes

No

{Ask those with a credit card who expect to have outstanding balances at the end of this academic year}

CCENDAM

How much do you expect to have outstanding?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

- XCREDIT/XBORR add answer given

6.4 Hire purchase/credit agreements

{Ask all}

HP

(Excluding anything you have already told me about) have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER; and your partner) bought anything under a hire-purchase or credit agreement, or other credit agreement where you pay for items in instalments, on which you are currently making repayments? Please exclude credit agreements for paying household bills such as insurance?

Yes

No

{Ask those with HP/credit agreements}

HPNUM

And how many of these do you have in total?

INTERVIEWER: If you are not sure of the exact number, please give your best estimate.

Numeric answer: range 0 to 15

{Repeat for each HP/credit agreement}

HPNAM

Now I'd like to ask you about each of these agreements in turn. What is the (first/second etc) agreement for?

RECORD ITEM. THIS WILL BE USED AS A TEXTFILL IN LATER QUESTIONS

Open answer

{Repeat for each HP/credit agreement}

HPAC1

How much money have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) paid in instalments or repayments so far this academic year on the (first/second etc) agreement?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

{Repeat for each HP/credit agreement}

HPAC2

Still thinking about the (first/second etc) agreement, how much more money do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and/or your partner) expect to pay on instalments or repayments between now and the end of this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

{Repeat for each HP/credit agreement}

HPAC3

How much will you still owe on this agreement after you have paid these instalments or repayments at the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

- XCREDIT/XBORR add answer given

7 FINANCIAL WELL-BEING

7.1 Financial management and well-being

{Ask all}

Intro

I'm now going to ask you about your financial well-being and future aspirations.

Continue

{Ask all}

DROP

Thinking about all your time studying on your course, have you ever thought about (IF NOT OU STUDENTS dropping out of your university/college) (IF OU STUDENTS giving up your Open University studies) course for any reason?

Yes

No

{Ask students who have thought about dropping out}

DROPWH

SHOWCARD CC

What was the main reason for this?

Financial reasons

Didn't like the course

Other academic reasons

Domestic/family/personal reasons

Job offer

Social reasons

Disenchantment with course/university or college

Other

{Ask all}

FINDIF

SHOWCARD **DD**

To what extent, if at all, do you think that financial difficulties have affected how well you do at university/college/Open University?

A great deal

A fair amount

A little

Not at all

{Ask if financial difficulties have affected how well the student has done at university}

FINDIFH

SHOWCARD **EE**

How have financial difficulties affected how well you do at university/college/Open University?

CODE ALL THAT APPLY

Caused worry and stress

Difficulties buying books and materials

Found it necessary to work in a paid job

Having to work extra hours in a paid job

Unable to cover travel costs to and from college

Health problems

Other

7.2 Arrears and debt

{Ask all}

ARRF

SHOWCARD **II**

At the end of the academic year do you think that you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) will be behind on 2 or more payments for any items on this card?

CODE ALL THAT APPLY

Rent

Gas

Electricity

Water

Goods on hire purchase

Mortgage repayments

Council tax

Credit Card payments

Mail order catalogue payments

Telephone

Childcare payments

TV licence

Road Tax

Child support or maintenance

Other items

None of these – code if spontaneously mentioned

{Repeat for every item they think they will be in arrears with at the end of the academic year}

ARRFAM

So how much in total do you think you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) will be in arrears with these bills by the end of DATE?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 20000

- XARR/XBORR add answer given

8 FUTURE ASPIRATIONS

8.1 Future plans

{Ask all}

FUTPLAN

SHOWCARD **KK**

I'd now like to ask you about your future plans. Thinking about the future, what do you hope to do when you have finished your current course?

CODE ALL THAT APPLY

USE CODE BELOW TO INDICATE 'DON'T KNOW'

Get a job in your chosen career

Get a temporary/fill in job

Get a different sort of job from the one you have now

Get a better job from the one you have now / Get a promotion

Continue studying

Take time off/go traveling

Retire

Do something else

Don't know yet

{No Interviewer coding of "Don't know" allowed other than using the code above}

{Ask all}

FUTSAL1

What sort of salary do you expect to be earning in the first job you take once you have graduated?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

INTERVIEWER: If not expecting to work after graduation, code zero.

Numeric answer: range 0 to 100000

INTERVIEWER: If expect to continue in current job, ask how much they expect to be earning in this job after they have graduated.

{Ask all}

FUTSAL2

And what sort of salary would you hope to be earning five years after you complete your course?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 100000

9 EXPENDITURE

9.1 Housing costs

9.1.1 General

{Ask all}

HOUS

READ OUT TO ALL

I would now like to ask you questions about your expenditure in the academic year, that is between DATE and DATE. First of all I would like to ask you about your housing costs.

{Ask all}

{HOUS1a}

Are you currently living in the same place that you were living in at the start of the academic year, that is DATE?

Yes

No

{Ask those who are living in the same place now as at the start of the year}

{HOUS1b}

And do you expect to be living in the same place over the rest of the academic year, that is DATE or later?

Yes

No

{Ask if student has/will live in the same place over the academic year, except OU students }

HOUS2

And did you also live there during the vacations?

Yes

No

9.1.2 Questions asked if the student lives in one place and asked to all OU students

{Ask if students have lived in the same place over all of the academic year and OU students}

HOUS3

SHOWCARD LL

Which of the following best describes where you live?

Alone in rented house/flat/lodgings

Alone in a flat/house you are buying or own

With parents/step-parents or spouse's parents

In a house/flat owned by your parents/step-parents (but not living with them)

With a spouse/partner/relatives or children in a flat/house I/we are buying or own

With a spouse/partner/relatives or children in a flat/house I/we rent

With friends/students in a rented house/flat/lodgings (not provided by your University/college)

University/College provided accommodation e.g. halls of residence/student flat/hostel

Other (specify)

{Ask if students have lived in the same place over all of the academic year and OU students, who say other}

HOUS3SP

WRITE IN TYPE OF ACCOMMODATION

Open question

{Ask if students have lived in the same place over all of the academic year and OU students. Ask all who are buying or own their own house, either alone or with spouse/children}

HOUS4

Are you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) buying this property on a mortgage at the moment, or do you own this property outright?

Making repayments

Own outright

{Ask if students have lived in the same place over all of the academic year and OU students. Ask all who are buying or own their own house, either alone or with spouse/children. Ask if student is paying mortgage currently}

HOUS5

What are your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse's/partner's) monthly mortgage repayments on this property, including any endowment policies, interest payments or insurance policies related to the mortgage or property?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XRENT/XHOUSE/XSPEND
 - add amount answered multiplied by 9 if student is college/uni based
 - add amount answered multiplied by 12 if student is an OU student

{Ask if students have lived in the same place over all of the academic year and OU students. Ask all who are buying or own their own house, either alone or with spouse/children and who live in a household containing more than 1 person}

HOUS6

And do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) get any rent from lodgers or sharers which you have not already told me about?

Yes getting rent not already mentioned

No

{Ask if students have lived in the same place over all of the academic year and OU students. Ask all who are buying or own their own house, either alone or with spouse/children and who live in a household containing more than 1 person. Ask all who receive rent from lodgers/sharers that has not already been mentioned}

HOUS7

How much rent do you receive per month?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 5000

XOTHINC/XINCOME

- add amount answered multiplied by 9 if student and is college/uni based
- add amount answered multiplied by 12 if student is an OU student

{Ask if students have lived in the same place over all of the academic year and OU students. All who are renting their accommodation}

HOUS8

How much does your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse's/partner's) rent cost per month - this should include the total rent charged to you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse/partner), even if you receive contributions towards this from others?

Numeric answer: range 0 to 10000

- XRENT/XHOUSE/XSPEND
 - add amount answered multiplied by 9 if student is college/uni based
 - add amount answered multiplied by 12 if student is an OU student

{Ask if students have lived in the same place over all of the academic year and OU students. All who are renting their accommodation}

HOUS9

How much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) actually pay towards this rent of £AMOUNT?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 50000

7.2.1 Split by terms/vacation – university/college based students

First term

{Ask students (except OU students) who lived in different places over the academic year}

HOUSa

SHOWCARD LL

Now I would like to ask you some questions about your housing costs since the beginning of the academic year, starting with the first term that is from DATE to DATE. Looking at this card, where were you living in the first term. If you moved part way through the first term, please tell me where you spent longest?

Alone in rented house/flat/lodgings

Alone in a flat/house you are buying or own

With parents/step-parents or spouse's parents

In a house/flat owned by your parents/step-parents (but not living with them)

With a spouse/partner/relatives or children in a flat/house I/we are buying or own

With a spouse/partner/relatives or children in a flat/house I/we rent

With friends/students in a rented house/flat/lodgings (not provided by your University/college)

University/College provided accommodation e.g. halls of residence/student flat/hostel

Other (specify)

{Ask students (except OU students) who lived in different places over the academic year who say other}

HOUSTaSP

WRITE IN TYPE OF ACCOMMODATION

Open question

{Ask students (except OU students) who lived in different places over the academic year}

HOUSb

How much does your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse's/partner's) rent or mortgage cost per month?

This should include the total rent/mortgage charged to you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) even if you receive contributions towards this from others?

IF STUDENT OWNS OR IS PAYING A MORTGAGE: Remember to include any endowment policies, interest payments or insurance policies.

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XRENT/XHOUSE/XSPEND

- add amount answered multiplied by 2.5

{Ask students (except OU students) who lived in different places over the academic year}

HOUSc

How much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) actually pay towards this £AMOUNT?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

INTERVIEWER: Please include any money given to respondent (e.g. by parents) to pay rent.

Numeric answer: range 0 to 10000

First vacation

{Ask students (except OU students) who lived in different places over the academic year}

HOUSd

Where did you live during the first vacation, that is from DATE to DATE. Was it the same place you lived in during the first term with the same rent, if any, or was it different?

Yes same place and rent

No

- XRENT/XHOUSE/XSPEND

- If yes is answered, add amount answered at HOUSb x 2 (using the assumption that rent over the Christmas vacation is an approximation for rent over the Easter vacation)

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term}

HOUSE

SHOWCARD LL

Where was it. If you moved part way through the first vacation please tell me where you spent longest?

Alone in rented house/flat/lodgings

Alone in a flat/house you are buying or own

With parents/step-parents or spouse's parents

In a house/flat owned by your parents/step-parents (but not living with them)

With a spouse/partner/relatives or children in a flat/house I/we are buying or own

With a spouse/partner/relatives or children in a flat/house I/we rent

With friends/students in a rented house/flat/lodgings (not provided by your University/college)

University/College provided accommodation e.g. halls of residence/student flat/hostel

Other (specify)

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term who say other}

HOUSeSP

WRITE IN TYPE OF ACCOMMODATION

Open question

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term}

HOUSf

How much did your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse's/partner's) rent or mortgage cost per month?

IF STUDENT OWNS OR IS PAYING A MORTGAGE: Remember to include any endowment policies, interest payments or insurance policies.

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XRENT/XHOUSE/XSPEND

- add amount answered x 2 (using the assumption that rent over the Christmas vacation is an approximation for rent over the Easter vacation)

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term}

HOUSg

How much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) actually pay towards this £AMOUNT?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term}

HOUSH

Over the first vacation, did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) have to pay rent or a retainer for any accommodation that you were not actually living in?

Yes

No

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term and if they paid a retainer over the first vacation}

HOUSi

How much did this cost. Please tell me the actual cost for your share of the retainer, even if someone else helped you pay for this. You can tell me how much you paid per week or for the whole vacation?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR RETAINER/RENT

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term and if they paid a retainer over the first vacation}

HOUSj

RECORD THE AMOUNT

Numeric answer: range 0 to 10000

- XRETAIN/XHOUSE/XSPEND

- Add amount answered x 2 if vacation was coded
- Add amount answered X 8 if week was coded
- (Again using the assumption that any retainer paid over the Christmas vacation is an approximation for a retainer over the Easter vacation)

{Ask students (except OU students) who lived in different places over the academic year. If they lived in a different place in the first vacation to the first term and if they paid a retainer over the first vacation}

HOUSk

And how much of this £AMOUNT did you actually pay yourself?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

Second term

{Ask students (except OU students) who lived in different places over the academic year}

HOUSl

Where did/do you live during the second term, that is from DATE to DATE.

Was it the same place you lived in during the first vacations with the same rent, if any, or was it different?

Yes same place and rent

No

- XRENT/XHOUSE/XSPEND

- If yes is answered, add amount answered at HOUSf x 5 (using the assumption that rent in the second term is an approximation for rent over the third term)

{Ask students (except OU students) who lived in different places over the academic year}

HOUSm

SHOWCARD LL

Looking at this card, where were/are you living in the second term. If you moved part way through the second term, please tell me where you spent longest?

Alone in rented house/flat/lodgings

Alone in a flat/house you are buying or own

With parents/step-parents or spouse's parents

In a house/flat owned by your parents/step-parents (but not living with them)

With a spouse/partner/relatives or children in a flat/house I/we are buying or own

With a spouse/partner/relatives or children in a flat/house I/we rent

With friends/students in a rented house/flat/lodgings (not provided by your University/college)

University/College provided accommodation e.g. halls of residence/student flat/hostel

Other (specify)

{Ask students except OU students who lived in different places over the academic year who say other}

HOUSmSP

WRITE IN TYPE OF ACCOMMODATION

Open question

{Ask students (except OU students) who lived in different places over the academic year}

HOUSn

How much does your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: and your spouse's/partner's) rent or mortgage cost per month?

IF STUDENT OWNS OR IS PAYING A MORTGAGE: Remember to include any endowment policies, interest payments or insurance policies?

Numeric answer: range 0 to 10000

- XRENT/XHOUSE/XSPEND

- Add amount answered x 5 (using the assumption that rent in the second term is an approximation for rent over the third term)

{Ask students (except OU students) who lived in different places over the academic year}

HOUSo

How much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) actually pay towards this £AMOUNT?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

9.1.3 Last summer vacation

{Ask second year students and above (except OU students)}

HOUSp

Last summer vacation, that is between DATE and DATE, did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) have to pay a retainer for any accommodation you were *not* actually living in?

Yes

No

{Ask second year students and above (except OU students) who had to pay a retainer over last summer vacation}

HOUSq

How much did this cost. Please tell me the actual cost for your share of the retainer, even if someone else helped you pay for your share. You can tell me per week, per calendar month or for the whole vacation?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

RECORD THE TIME PERIOD FOR SUMMER VACATION RETAINER

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask second year students and above (except OU students) who had to pay a retainer over last summer vacation}

HOUSr

RECORD THE AMOUNT FOR SUMMER VACATION RETAINER

Numeric answer: range 0 to 10000

- XRETAIN/XHOUSE/XSPEND
- add amount answered multiplied by 1 if vacation is answered at HOUSQ
- add amount answered multiplied by 3 if month or 4 weeks is answered at HOUSQ
- add amount answered multiplied by 12 if week is answered at HOUSQ

{Ask second year students and above (except OU students) who had to pay a retainer over last summer vacation}

HOUSs

And how much of this £AMOUNT did you actually pay yourself?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Ask second year students and above (except OU students) }

HOUSu

Last summer vacation did you have to pay rent or payments towards a mortgage, *excluding* mortgages for properties in which you were not living?

Yes

No

{Ask second year students and above (except OU students) who paid a mortgage/rent in the last summer vacation}

HOUSv

How much did this cost per month?

RECORD THE AMOUNT FOR SUMMER VACATION MORTGAGE

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- XRETAIN/XHOUSE/XSPEND - add amount answered multiplied by 3

{Ask second year students and above (except OU students) who paid a mortgage/rent in the last summer vacation}

HOUSw

And how much of this £AMOUNT did you actually pay yourself?

RECORD THE AMOUNT FOR SUMMER VACATION MORTGAGE

Numeric answer: range 0 to 10000

9.2 Housing Benefit

{Ask if student, or spouse/partner, receives housing benefit}

HB1

You told me earlier that you receive housing benefit of (AMOUNT) per week. Can I just check, did the amount of rent you have been telling me about include or exclude this housing benefit?

Included

Excluded

- XRENT/XHOUSE/XSPEND - If "excluded" is answered here, add amount of housing benefit over the year

{Ask if student owns or is buying a flat/house (at any stage in the academic year) and has received income support}

HB2

Since the beginning of this academic year have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) received any help with mortgage interest payments in addition to your Housing Benefit. This is called 'Income Support Mortgage Interest'?

Yes

No

{Ask if student owns or is buying a flat/house (at any stage in the academic year) and has received income support and mortgage interest payments}

HB3

How much assistance with your mortgage interest have you received so far this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 20000

{Ask if student owns or is buying a flat/house (at any stage in the academic year) and has received income support and mortgage interest payments}

HB4

Did the housing costs you told me about earlier, for the year so far, include or exclude this assistance with your mortgage?

Included

Excluded

- XRENT/XHOUSE/XSPEND - If "excluded" is answered here, add amount answered at HB3

{Ask if student owns or is buying a flat/house (at any stage in the academic year) and has received income support and mortgage interest payments}

HB5

How much assistance with your mortgage interest do you expect to receive between now and the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 20000

{Ask if student owns or is buying a flat/house (at any stage in the academic year) and has received income support and mortgage interest payments}

HB6

Did the housing costs you told me about earlier for the remainder of the academic year include or exclude the assistance with your mortgage interest which you will receive?

Included

Excluded

- XRENT/XHOUSE/XSPEND - If "excluded" is answered here, add amount answered at HB5

9.3 Council Tax

{Ask all aged 18 and over at the start of their course}

CT1a

Have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) paid any council tax during the course of the academic year, that is since DATE - please do not include payments made covering time before the start of the academic year or payments included in your rent which you have already talked about?

Yes

No

{Ask all aged 18 and over at the start of their course}

CT1b

Do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) expect to pay council tax in the rest of the academic year?

Yes

No

{Ask if student or partner has paid council tax already}

CT2

How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) paid towards council tax so far this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3000

- XOTHHOUS/XHOUSE/XSPEND - add amount answered

{Ask all aged 18 and over at the start of their course who expect to pay council tax in the rest of the year}

CT3

How much (more) council tax if any, do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) expect to pay between now and the end of the academic year?

INTERVIEWER IF NEEDED: If you pay by direct debit you may only make payments for 10 out of 12 months.

Numeric answer: range 0 to 3000

- XOTHHOUS/XHOUSE/XSPEND - add amount answered

{Ask if student has paid council tax}

CT4

Since the beginning of this academic year, that is since DATE, have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) received any council tax benefit?

INTERVIEWER: This does not include the 25% discount on Council Tax that households with full-time students can receive.

Yes

No

{Ask if student has paid council tax and has received council tax benefit}

CT5

How much council tax benefit have you received so far this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 3000

- XBENS/XINCOME - add amount answered

{Ask if student has paid council tax and has received council tax benefit}

CT6

Did the amount of council tax you told me about earlier, for the year so far, include or exclude this council tax benefit?

Included

Excluded

- XOTHHOUS/XHOUSE/XSPEND - If "excluded" is answered here, add amount answered at CT5

{Ask if student expects to pay council tax in the rest of the academic year}

CT7

How much (more) council tax benefit do you expect to receive between now and the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 5000

- XBENS/XINCOME - add amount answered

{Ask all aged 18 and over at the start of their course}

CT8

Has anyone else paid (i.e. not your partner/spouse) any council tax on your behalf during the course of the academic year, that is since DATE - please do not include payments made before the start of the academic year or payments included in your rent which you have already talked about?

Yes

No

{Ask if someone else has paid towards student's council tax}

CT9

How much did they pay towards your council tax so far this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 1200

- XGIFTS/XFAMILY/XINCOME - add amount answered

{Ask if someone else has paid towards students council tax}

CT10

How much (more) council tax if any, do you expect them to pay between now and the end of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 1200

- XGIFTS/XFAMILY/XINCOME - add amount answered

{Ask if someone else has paid towards students council tax}

CT11

Did the amount of council tax you told me about earlier, for the year so far, include or exclude the money paid on your behalf?

Included

Excluded

- XOTHHOUS/XHOUSE/XSPEND - If "excluded" is answered here, add amount answered at CT10

9.4 Household expenditure/bills

REMEMBER THAT FOR MARRIED COUPLES OR THOSE LIVING TOGETHER THE INFORMATION IS REQUIRED FOR THE HOUSEHOLD

{Ask all}

WAT

Since the beginning of the academic year, that is since DATE, have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) made or do you expect to make a payment in connection with accommodation you have lived in during that time for *water charges* - *This would be in addition to any rent or other payments you have already told me about?*

Yes

No

{Ask all}

ELEC

(Since the beginning of the academic year have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) made or do you expect to make a payment for) *mains electricity?*

INTERVIEWER: Include payments for packages combining gas/electricity

Yes

No

{Ask all}

GAS

(Since the beginning of the academic year have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) made or do you expect to make a payment for) *mains gas?*

INTERVIEWER: Include payments for packages combining gas/electricity

Yes

No

{Ask all}

FUEL

(Since the beginning of the academic year have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) made or do you expect to make a payment for) *other fuel bills* e.g. solid fuel?

Yes

No

{Repeat for each type of household expenditure student has}

BILLA

Thinking of your last payment for (HOUSEHOLD ITEM) how much did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) have to pay. If you share this bill with others, please include the share you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your spouse/partner) are responsible for.

INTERVIEWER ENCOURAGE STUDENT TO LOOK AT THEIR BILLS IF THEY ARE NOT SURE.

Numeric answer: Range 0 to 1000

{Repeat for each type of household expenditure student has}

BILLB

And what period of time did this amount cover?

CODE AS APPROPRIATE

INTERVIEWER ENCOURAGE STUDENT TO LOOK AT THEIR BILLS IF THEY ARE NOT SURE.

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

- XOTHHOUS/XHOUSE/XSPEND

- add amount given at BILLA multiplied by 1 if "academic year/course" was answered at bill
- add amount given at BILLA multiplied by (time period multiplier/ two) for other answer givens at BILLB

{Repeat for each type of household expenditure student has}

BILLC

And about how much (more), if anything, do you think you will have to pay for (HOUSEHOLD ITEM) between now and the end of this academic year?

(SAY FOR MAINS ELECTRICITY AND MAINS GAS ONLY Remember that the payment you've just told me about included the winter period when the weather may have been particularly cold, and the Christmas vacation when you may not have been living in your accommodation. The period of time which I'm asking about now will be the spring and summer terms, including the Easter vacation?)

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: Range 0 to 1000

INTERVIEWER: If paid for as part of package, estimate approximate share of bill for this service.

{Check if "don't know" is answered. If you paid about the same as you have done so far this would mean you might pay around £AMOUNT. Does this sound about right to you? INTERVIEWER ENTER FIGURE IF APPROPRIATE}

- XOTHHOUS/XHOUSE/XSPEND – add amount answered

9.5 Telephones/mobile phones

{Ask all}

Tel1

The next questions are about telephones. Do you have a landline phone, a mobile phone or both?

INTERVIEWER IF NEEDED: By landline phone we mean a phone that is fixed within your flat or house. This may include a landline that is used for access to the internet.

INTERVIEWER: If phone paid for as part of package (e.g. with internet or satellite TV), please include.

Landline only

Mobile phone only

Both landline and mobile phone

None – code if spontaneously mentioned

{Ask those with landline phones}

TELA

Thinking of your last payment for your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner's) landline telephone, how much did you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER and your spouse/partner) have to pay?

INTERVIEWER ENCOURAGE STUDENT TO LOOK AT THEIR BILLS IF THEY ARE NOT SURE. ACCEPT AN ESTIMATE. INCLUDE ANY FEES THEY INCURE FOR INTERNET ACCESS

INTERVIEWER: If phone paid for as part of package (e.g. with internet or satellite TV), please include cost of whole package

Numeric answer: Range 0 to 1000

{Ask those with landline phones who have paid towards a bill }

TELB

And what period of time did this amount cover?

CODE AS APPROPRIATE

INTERVIEWER ENCOURAGE STUDENT TO LOOK AT THEIR BILLS IF THEY ARE NOT SURE.

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Check if amount was given per week "This means that you have paid about £AMOUNT" over the academic year/course so far. Does that sound about right to you?}

- **XPERS /XPERST/ XLIVING/XSPEND**

- add amount given at TELA multiplied by 1 if TELB was "academic year/course"

- add amount given at TELA multiplied by (time period multiplier/ two) for other answers given at TELB

{Ask those with landline phones}

TELC

And about how much (more), if anything, do you think you will have to pay for your (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner's) landline telephone between now and the end of this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: Range 0 to 1000

INTERVIEWER: If phone paid for as part of package (e.g. with internet or satellite TV), please include cost of whole package

{Check if "don't know" as answered. If you paid about the same as you have done so far this would mean you might pay around £AMOUNT. Does this sound about right to you? INTERVIEWER ENTER FIGURE IF APPROPRIATE}

- **XPERS /XPERST/ XLIVING/XSPEND- add amount answered**

{Ask those with mobile phones}

MOBA

Thinking of your last payment for your mobile phone, how much did you have to pay?

INTERVIEWER ENCOURAGE STUDENT TO LOOK AT THEIR BILLS/RECEIPTS IF THEY ARE NOT SURE. ACCEPT AN ESTIMATE.

Numeric answer: Range 0 to 1000

{Ask those with mobile phones who have paid towards a bill }

MOBB

And what period of time did this amount cover?

CODE AS APPROPRIATE

INTERVIEWER ENCOURAGE STUDENT TO LOOK AT THEIR BILLS IF THEY ARE NOT SURE.

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Check if amount was given per week "This means that you have paid about £AMOUNT" over the academic year/course so far. Does that sound about right to you?}

- **XPERS / XPERST /XLIVING/XSPEND**

- add amount given at MOBA multiplied by 1 if "academic year/course" is answered at MOBB

- add amount given at MOBA multiplied by (time period multiplier/ two) for othe answers given MOBB

{Ask those with mobile phones}

MOBC

And about how much (more), if anything, do you think you will have to pay for the mobile phone between now and the end of this academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: Range 0 to 1000

{Check if "don't know" as answered. If you paid about the same as you have done so far this would mean you might pay around £AMOUNT. Does this sound about right to you? INTERVIEWER ENTER FIGURE IF APPROPRIATE}

- **XPERS / XPERST /XLIVING/XSPEND- add amount answered**

9.6 Travel

{NB IF STUDENTS MARRIED/COHABITING DO NOT ASK ABOUT SPOUSE'S OR PARTNER'S EXPENDITURE ON PUBLIC TRANSPORT}

{Ask all}

VEH

Now I would like to ask you about your travel costs. At any time since the beginning of the academic year, that is since DATE, have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) owned or had the regular use of ...READ OUT...

CODE ALL THAT APPLY

A car or van

A moped or motorcycle

Or a bicycle?

None of these

{Ask if student owns a car/van/moped/motorcycle}

VCOST

About how much do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner's) spend on motor vehicle tax, insurance, repairs and maintenance over the year - please do NOT include petrol and any loans to pay for the vehicle that you have already told me about?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

- **XLIVTRAV/ XLIVTRAT/XLIVING/XSPEND – add amount answered**

{Ask OU students}

OUTRAV

I'd like to know if you sometimes travel somewhere, other than to work or home, to carry out your studying, or to make studying possible. Please do not include day schools or residential schools – these will be covered later?

Yes

No

{Ask full-time and part-time students and OU who travel in connection with their course}

TRAVST

SHOWCARD **MM**

Please look at this card and tell me how you usually travel between your (FOR independent students or dependent students living with family: home / FOR dependent students living away from home: term-time accommodation) or work and your place of study?

CODE ALL THAT APPLY

On foot

Bicycle

Lift from friend/relative

Own car or van

Own moped or motorcycle

Bus or coach

Underground

Train

Other

{Ask those who travel to place of study by bicycle, lift from friend/relative, bus or coach, underground, train or other}

TRCOST

Roughly how much do you spend every week on transport to and from your places of study from your (FOR independent students or dependent students living with family: home / FOR dependent students living away from home: term-time accommodation) or work. Please do not include cost of petrol for your own vehicle?

INTERVIEWER: If the student buys a travel card or pass to cover a long period of time, work out how much this costs weekly. E.g. £80 for 4 weeks costs £20 a week.

Numeric answer: range 0 to 200

- XPARTRAV/XPARTIC/XSPEND
 - add amount answered multiplied by 39 if student is university based student
 - add amount answered multiplied by 39 if student is an OU student on one course
 - add amount answered multiplied by 52 if student is an OU student on two or more courses

{Ask if student travels to their place of study by their own car/van/moped/motorcycle}

PETR

How much do you spend every week on petrol getting to and from university/college from (FOR independent students or dependent students living with family: home / FOR dependent students living away from home: term-time accommodation) or work?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 200

- XPARTRAV/XPARTIC /XSPEND
 - add amount answered multiplied by 39 if student is university based student
 - add amount answered multiplied by 39 if student is an OU student on one course
 - add amount answered multiplied by 52 if student is an OU student on two or more courses

{Ask dependent students if they have not always lived with their parents/family}

FAMP

So far this academic year, have you made any journeys between your term-time accommodation and your parents' or family home, which you personally have had to pay for?

Yes

No

{Ask dependent students who have travelled to their parents'/family home}

FAMPAM

How much have you spent so far on travel between your term-time accommodation and your parents' or family home - please include the journeys you make at the start and end of each term, if you personally have to pay for these?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

{Check if more than £1000 is coded. "This seems quite high. Can I just check what I have recorded?"}

- XLIVTRAV/XLIVTRAT/ XLIVING/XSPEND - add amount answered

{Ask dependent students if they have not always lived with their parents/family}

FAMF

And between now and the end of the academic year, do you expect to make any (more) journeys between your term-time accommodation and your parents' or family home, which you personally will have to pay for?

Yes

No

{Ask if dependent students expect to travel to parents'/family home before the end of the academic year}

FAMFAM

How much (more) do you expect to spend on travel between your term-time accommodation and your parental/family home, between now and the end of the academic year - again, please include the journeys you make at the start and end of each term, if you personally have to pay for these?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

{Check if more than £1000 is coded. "This seems quite high. Can I just check what I have recorded?"}

- **XLIVTRAV/XLIVTRAT/ XLIVING/XSPEND - add amount answered**

{Ask all}

TRIP1

Since the beginning of this academic year have you been on any trips associated with your course work, such as field study trips, residential school, or do you expect to go on any such trips before the end of the academic year (IF NOT OU STUDENTS: or during the next long vacation)?

Yes

No

{Ask if student has been on trips}

TRIP4

Was the cost of this met entirely by the college/university or by a special grant or did you have to pay something towards it yourself?

CODE ALL THAT APPLY

Paid entirely by college/university

Paid by special grant

Student paid something towards it

{Ask if student paid towards trips}

TRIP5

How much would you estimate that this trip/these trips will cost you in total over the whole of the academic year?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

{Check if more than £1000 is coded. "This seems quite high. Can I just check what I have recorded?"}

- **XPARTRAV/XPARTIC/XSPEND - add amount answered**

{Ask all}

HOLS1

Apart from the travel costs we've already discussed, how much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) spent so far this academic year on holidays - please include the full cost of the holiday, not just the travel cost. (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: However, please do not include the cost of any business trips your spouse/partner may have been on?)

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 20000

{Check if more than £2000 is coded. " Can I just check what I have recorded?"}

- **XLIVTRAV/XLIVTRAT/ XLIVING /XSPEND - add amount answered**

{Ask all}

HOLS2

And how much (more) do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to spend on holidays and this type of travel between now and the end of the academic year that is DATE (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: However, please do not include the cost of any business trips your spouse/partner may go on?)

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 20000

{Check if more than £2000 is coded. "Can I just check what I have recorded?"}

- XLIVTRAV/XLIVTRAT/ XLIVING /XSPEND - add amount answered

9.7 Books and equipment

9.7.1 Books, workbooks, papers and pamphlets

{Ask all}

BOOK1

So far (IF NOT-OU: this academic year, including immediately before your first term started,) (IF OU: since August 2007,) how much if anything have you personally spent on new or second-hand books, workbooks, papers or pamphlets you needed for your course work - please do not include photocopying or printing as these will be asked about separately.

We will also ask about books you receive as gifts later?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 3000

{Check if more than £600 is coded. "This seems quite high. Can I just check what I have recorded?"}

- XBOOKS/XPARTIC /XSPEND - add amount answered

{Ask all}

BOOK2

And how much (more), if any, do you expect to spend on books, workbooks, papers or pamphlets for college between now and (IF NOT-OU the end of the academic year) (IF OU: the end of July 2008) - again, please do not include photocopying or printing as these will be asked about separately?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 3000

{Check if more than £600 is coded. "This seems quite high. Can I just check what I have recorded?"}

- XBOOKS/XPARTIC /XSPEND - add amount answered

{Ask all}

BOOK3

Are there any books which you needed to buy for university/college but which you did not buy?

Yes

No

{Ask all}

BOOK5

So far (IF NOT-OU: this academic year, including immediately before your first term started,) (IF OU: since August 2007,) have you received as a gift any books, workbooks, papers or pamphlets you needed for your course work. (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: Please do not include books paid for by your partner or spouse)?

Yes

No

{Ask if student received books etc as gifts}

BOOK6

How much were these worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3000

{Check if more than £600 is coded. "This seems quite high. Can I just check what I have recorded?"}

- XGIFTS/XFAMILY /XINCOME - add amount answered

{Ask all}

BOOK7

Between now and (IF NOT OU the end of the academic year) (IF OU: the end of July 2008), do you expect to receive gifts of any (more) books, workbooks, papers or pamphlets for your course work?

Yes

No

{Ask if student expect to receive books etc as gifts in the rest of the year}

BOOK8

How much do you think these will be worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3000

{Check if more than £600 is coded. "This seems quite high. Can I just check what I have recorded?"}

- XGIFTS/XFAMILY /XINCOME - add amount answered

{Ask all}

BOOK9

So far (IF NOT-OU: this academic year, including immediately before your first term started,) (IF OU: since August 2007,) have you sold any books, workbooks, papers or pamphlets that you bought for your course?

INTERVIEWER IF NEEDED: Please include the sale of books etc bought in earlier years as well as those bought this year.

Yes

No

{Ask if student has sold books this year}

BOOK10

How much money altogether did you receive for selling these books, workbooks, papers or pamphlets?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3000

{Check if more than £600 is coded. "This seems quite high. Can I just check what I have recorded?"}

- XOTHINC/XINCOME - add amount answered

{Ask all}

BOOK11

Between now and (IF NOT OU the end of the academic year) (IF OU: the end of July 2008), do you expect to sell any (more) of the books or pamphlets that you bought for your course?

INTERVIEWER IF NEEDED: Please include the sale of books etc bought in earlier years as well as those bought this year.

Yes

No

{Ask if student expects to sell books etc this year}

BOOK12

How much do you expect you will receive for these?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 3000

{Check if more than £600 is coded. "This seems quite high. Can I just check what I have recorded?"}

- XOTHINC/XINCOME - add amount answered

9.7.2 Photocopying and stationery

{Ask all}

PHOT1

So far this academic year since DATE, how much have you personally spent on photocopying, the use of a printer and stationery such as pens, disks and other items of computer equipment or software that you needed for your course work?

You can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask all}

PHOT1AM

CODE THE AMOUNT

Numeric answer: range 0 to 1000

{Check if more than £600 a year is coded. "This seems quite high. Can I just check what I have recorded?"}

- XBOOKS/XPARTIC /XSPEND - add amount answered multiplied by the time period multiplier for answer given at PHOT1 divided by 2

{Ask all}

PHOT2

And how much more do you expect to spend on photocopying, the use of a printer and stationery such as pens, disks and other items of computer equipment or software you need for your course work between now and DATE - you can tell me this for the whole academic year, per term, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask all}

PHOT2AM

CODE THE AMOUNT

Numeric answer: range 0 to 1000

{Check if more than £600 a year is coded. "This seems quite high. Can I just check what I have recorded?"}

- XBOOKS/XPARTIC /XSPEND - add amount answered multiplied by the time period multiplier for answer given at PHOT2 divided by 2

9.7.3 Computers

{Ask all}

COMPe

During the current academic year that is between DATE and DATE have you personally bought, or do you expect to buy a computer to use on course-related work?

CODE ALL THAT APPLY

Yes- already bought

Yes- expect to buy

No

{Ask if has bought a computer (COMPe)}

COMPf

And how much did you spend on the computer you have bought?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XBOOKS/XPARTIC /XSPEND - add amount answered

{Ask if student is going to buy a computer (COMPe)}

COMPg

And how much do you expect to spend on the computer you plan to buy?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XBOOKS/XPARTIC /XSPEND - add amount answered

{Ask if student has not already bought a computer (COMPh)}

COMPh

So far (IF NOT-OU: this academic year, including immediately before your first term started,) (IF OU: since August 2007,) have you received a personal computer used mainly for your course work as a gift ?

(IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: Please do not include a computer given to you as a gift from your partner or spouse.)

Yes

No

{Ask if student has not bought a computer (COMPe) and has not received a computer as a gift (COMPh)}

COMPhu

So far (IF NOT-OU: this academic year, including immediately before your first term started,) (IF OU: since August 2007,) have you received a personal computer used mainly for your course work as from your university or college ?

Yes

No

{Ask if student received a computer as a gift (COMPh)}

COMPi

How much in total was this worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XGIFTS/XFAMILY/XINCOME – add amount answered

{Ask if student received a computer from univeristy or college (COMPhu)}

COMPhu1

How much in total was this worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XOTHSTUD / XOSTUD / XINCOME – add amount answered

{Ask if student hasn't received a computer as a gift (COMPh), hasn't bought one or doesn't plan to buy one (COMPe) and hasn't received one from their university or college (COMPhu)}

COMPj

Between now and (IF NOT OU the end of the academic year) (IF OU: the end of July 2005), do you expect to receive a personal computer to use mainly for your course work as a gift?

Yes

No

{Ask if hasn't received a computer as a gift (COMPh), hasn't bought one or doesn't plan to buy one (COMPe) and has does not expect to receive one as a gift (COMPj) and hasn't received one from their university or college (COMPhu)}}

COMPju

Between now and (IF NOT OU the end of the academic year) (IF OU: the end of July 2005), do you expect to receive a personal computer to use mainly for your course work from your college or university?

Yes

No

{Ask if student expects to receive a computer as gift (COMPj)}

COMPk

How much do you think this will be worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XGIFTS/XFAMILY/XINCOME – add amount answered

{Ask if student expects to receive a computer from college/university (COMPju)}

COMPju1

How much do you think this will be worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XOTHSTUD / XOSTUD / XINCOME – add amount answered

{Ask all}

COMPL

In this academic year, have you sold a personal computer or do you expect to sell a computer?

INTERVIEWER, IF NEEDED: Please include the sale of a computer you bought in previous years.

Yes

No

{Ask if student has sold or expects to sell a computer}

COMPm

How much money did you receive or do you expect to receive?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 1 to 10000

- XOTHINC / XINCOME - add amount answered

9.7.4 Special equipment, clothing and materials

{Ask all}

EQU1

Is there any special equipment, clothing or materials that it is recommended you have for your course, that we haven't already discussed - this can be equipment that you have or don't have?

Yes

No

{Ask all who need special equipment etc}

EQU1

So far (IF NOT-OU: this academic year, including immediately before your first term started,) (IF OU: since August 2004,) how much have you personally spent on special equipment, clothing or materials needed for your course?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Check if more than £1500 a year is coded. "Can I just check what I have recorded?"}

- XBOOKS/XPARTIC /XSPEND - add amount answered

{Ask all who need special equipment etc}

EQU2

And how much (more), if anything, do you personally expect to spend between now and the end of the academic year on special equipment, materials or clothing for your course?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Check if more than £1500 a year is coded. "Can I just check what I have recorded?"}

- XBOOKS/XPARTIC /XSPEND - add amount answered

{Ask all who need special equipment etc}

EQU3

Has there been any equipment you needed for your course but which you did not buy?

Yes

No

{Ask all who need special equipment etc}

EQU5

So far (IF NOT-OU: this academic year, including immediately before your first term started,) (IF OU: since August 2004,) have you received as a gift any special equipment, materials or clothing for your course work? (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: Please do not include as gifts any special equipment paid for by your partner or spouse)?

Yes

No

{Ask if student has received gifts of equipment etc}

EQU6

How much in total was this worth?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Check if more than £1500 a year is coded. "Can I just check what I have recorded?"}

- XGIFTS/XFAMILY/XINCOME – add amount answered

{Ask all who need special equipment etc}

EQU7

Between now and (IF NOT OU the end of the academic year) (IF OU: the end of July 2005), do you expect to receive any (more) special equipment, materials or clothing that you need for your course work as a gift?

Yes

No

{Ask if student expects to receive any gifts of equipment etc}

EQU8

How much do you think this will be worth in total?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Check if more than £1500 a year is coded. "Can I just check what I have recorded?"}

- XGIFTS/XFAMILY/XINCOME – add amount answered

{Ask all who need special equipment etc}

EQU9

So far (IF NOT-OU: this academic year) (IF OU: since August 2004) have you sold any special equipment, materials, or clothing that you had bought for your course work - please include any sales of equipment that you bought in previous years?

Yes

No

{Ask if student has sold special equipment etc this year}

EQU10

How much money altogether did you receive for these items?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Check if more than £1500 a year is coded. "Can I just check what I have recorded?"}

- XOTHINC/XINCOME - add amount answered

{Ask all who need special equipment etc}

EQU11

Between now and (IF NOT OU the end of the academic year) (IF OU: the end of July 2005), do you expect to sell any special equipment or clothing that you bought for your course?

Yes

No

{Ask if student expects to sell and special equipment etc in the rest of the academic year}

EQUPI2

How much do you expect to receive for these items?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 10000

{Check if more than £1500 a year is coded. "Can I just check what I have recorded?"}

- XOTHINC/XINCOME - add amount answered

9.8 Other course expenditure

{Ask all, except OU students}

COLFEE

SHOWCARD NN

Do you personally have to pay any of the following at your college?

CODE ALL THAT APPLY

A general amenity fee (additional to tuition fees, an extra payment to cover services and facilities provided by the institution)

A Junior Common Room fee

Health service fees

Dining room fee

Any other 'amenity' fees

None of these (Code if spontaneously mentioned)

{ Ask all, except OU students if they pay a college fee above. Repeat for each item mentioned above}

COLFAM

What is the total amount per academic year that you pay for (NAME OF ITEM)?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 5000

{Check if more than £1200 a year is coded. "Can I just check what I have recorded?"}

- XBOOKS/XPARTIC/XSPEND - add amount answered

{Ask OU students}

OUAMF

Do you personally have to pay any fees for amenities that are to do with your studying, such as library fees?"

Yes

No

{OU students who pay fees for amenities at OUAMF}

OUAMFAM

What is the total amount per year that you pay for these amenities?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 5000

{Check if more than £1200 a year is coded. "Can I just check what I have recorded?"}

- XBOOKS/XPARTIC/XSPEND - add amount answered

9.9 Child related expenditure

9.9.1 General

{Ask all questions in this section to students with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children}

CH

SHOWCARD OO

Now I'd like to ask you what you spend on your child(ren).

Continue

{Ask all}

CH1

How much did you spend *last month*, that is in the month ending yesterday, on your children's toys and children's books and presents, excluding Christmas (and other religious festivals) and birthday presents?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. Numeric answer: range 0 to 5000

- XCHILD/XSPEND
- add amount answered multiplied by 9 for college/university based students (approx number of months in the academic year)
- add amount answered multiplied by 12 for OU students (Number of months in the OU 'academic year')

{Ask all}

CH2

How much do you spend on your children's Christmas, other religious festivals and birthday presents *over the academic year*?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

- XCHILD/XSPEND- add amount answered

Numeric answer: range 0 to 5000

{Ask all}

CH3

How much did you spend *last month* on your children's clothes and shoes, excluding school uniforms?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. By last month we mean the month ending yesterday

Numeric answer: range 0 to 5000

- XCHILD/XSPEND
- add amount answered multiplied by 9 for college/university based students (approx number of months in the academic year)
- add amount answered multiplied by 12 for OU students (Number of months in the OU 'academic year')

{Ask if a child is aged 5 to 18}

CH4

And how much do you spend *over the year* on school uniforms?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. Numeric answer: range 0 to 5000

- XCHILD/XSPEND- add amount answered

{Ask all}

CH5

How much did you spend *last month* on your children's entertainment and hobbies?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. By last month we mean the month ending yesterday

Numeric answer: range 0 to 5000

- XCHILD/XSPEND
- add amount answered multiplied by 9 for college/university based students (approx number of months in the academic year)
- add amount answered multiplied by 12 for OU students (Number of months in the OU 'academic year')

{Ask if a child is aged 2 or less}

CH6

How much did you spend *last month* on nappies and toiletries?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. By last month we mean the month ending yesterday

Numeric answer: range 0 to 500

- XCHILD/XSPEND
- add amount answered multiplied by 9 for college/university based students (approx number of months in the academic year)
- add amount answered multiplied by 12 for OU students (Number of months in the OU 'academic year')

{Ask if a child is aged 2 or less}

CH7

And how much do you spend *over the year* on baby equipment such as prams, pushchairs or car seats?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. Numeric answer: range 0 to 5000

- XCHILD/XSPEND- add amount answered

{Ask if a child is aged 4 to 18}

CH8

How much did you give *last month* in pocket money or allowance?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. By last month we mean the month ending yesterday

Numeric answer: range 0 to 500

- XCHILD/XSPEND
- add amount answered multiplied by 9 for college/university based students (approx number of months in the academic year)
- add amount answered multiplied by 12 for OU students (Number of months in the OU 'academic year')

{Ask if a child is aged 4 to 18}

CH9

How much did you spend *last week*, or the last week your child(ren) were at school, on school lunches, packed lunches and school milk?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. By last week we mean the week ending yesterday

Numeric answer: range 0 to 500

XCHILD/XSPEND

- add amount answered multiplied by 39 for college/university based students (approx number of weeks in the academic year)
- add amount answered multiplied by 52 for OU students (Number of months in the OU 'academic year')

{Ask if a child is aged 4 to 18}

CH10

How much did you spend *last week*, or the last week your child(ren) were at school, on travel to and from school over and above any travel costs you have already told me about?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate. By last week we mean the week ending yesterday

Numeric answer: range 0 to 500

- XCHILD/XSPEND
- add amount answered multiplied by 39 for college/university based students (approx number of weeks in the academic year)
- add amount answered multiplied by 52 for OU students (Number of months in the OU 'academic year')

{Ask if a child is aged 4 to 18}

CH12

How much do you spend *over the year* on school trips and outings?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 500

- XCHILD/XSPEND- add amount answered

{Ask if a child is aged 4 to 18}

CH13

How much do you spend *over the year* on tuition fees, school fees or a school fund?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

Numeric answer: range 0 to 5000

- XCHILD/XSPEND- add amount answered

9.9.2 Childcare

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children}

CHC

SHOWCARD PP

I'd now like to ask you about childcare. By this I mean your child being looked after by someone other than you (IF HAS A PARTNER: or your spouse/partner) by the people or organisations on this showcard. Which of these types of childcare do you use?

Play school/nursery/ crèche/registered childminder

Baby sitter/au pair/nanny

After school care or after school clubs

None of these - code if spontaneously mentioned

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used a play school/nursery/ crèche/registered childminder }

CHC1

How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) spent on play school/nursery/crèche fees or a registered childminder - you can tell me so far over the academic year, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used a play school/nursery/ crèche/registered childminder }

CHC1AM

RECORD THE AMOUNT

Numeric: Range 1 to 5000

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used a play school/nursery/ crèche/registered childminder }

CHC1ST

What percentage of the play school, nursery, crèche or childminding you use is to *enable you to study*. By that I mean childcare that you use whilst revising, at a library or attending course or doing other course related activities?

Numeric answer: range 0 to 100

- XPARTRAV/XPARTIC/XSPEND - add (amount answered at CHC1AM multiplied by time period multiplier at CHC1) multiplied by (answer given at CHC1ST/100)
- XCHILD/XSPEND - add (amount answered at CHC1AM multiplied by time period multiplier at CHC1) multiplied by ((100 – the answer given at CHC1ST)/100)

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used baby sitter/au pair/nanny }

CHC2

How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) spent on baby sitters au pairs or nannies - you can tell me so far over the academic year, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used a baby sitter/au pair/nanny }

CHC2AM

RECORD THE AMOUNT

Numeric: Range 1 to 5000

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used a baby sitter/au pair/nanny }

CHC2ST

What percentage of the baby sitting, au pair or nannies childcare time you use is to *enable you to study*. (By that I mean childcare that you use whilst revising, at a library or attending course or doing other course related activities.)

Numeric answer: range 0 to 100

- XPARTRAV/XPARTIC/XSPEND - add (amount answered at CHC2AM multiplied by time period multiplier at CHC2) multiplied by answer given at CHC2ST/100

- XCHILD/XSPEND - add (amount answered at CHC2AM multiplied by time period multiplier at CHC2) multiplied by (100 – the answer given at CHC2ST)/100

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used after school care or after school clubs }

CHC3

How much have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER or your spouse/partner) spent on after school care or after school clubs - you can tell me so far over the academic year, per month or per week?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

CODE THE TIME PERIOD

Academic year/course

Quarter (3 months)

Term

Vacation

Month

4 weeks

Week

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have used after school care or after school clubs}

CHC3AM

RECORD THE AMOUNT

Numeric: Range 1 to 5000

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Ask if they have after school care or after school clubs}

CHC3ST

What percentage of the after school care or after school clubs you use is to *enable you to study*. (By that I mean childcare that you use whilst revising, at a library or attending course or doing other course related activities.)

Numeric answer: range 0 to 100

- XPARTRAV/XPARTIC/XSPEND - add (amount answered at CHC3AM multiplied by time period multiplier at CHC3) multiplied by answer given at CHC3ST/100

- XCHILD/XSPEND - add (amount answered at CHC3AM multiplied by time period multiplier at CHC3) multiplied by (100 – the answer given at CHC3ST)/100

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Except OU students}

UNICH1

Does your university or college have any childcare facilities either on or off site which undergraduate or PGCE students can use, including any you have already mentioned?

Yes

No

{Ask all with dependent children of their own or if they are married or have shared financial responsibility with a partner who has dependent children. Except OU students if the university has childcare facilities}

UNICH2

And have you ever used these childcare facilities?

Yes - currently using

Yes - have used in the past but not now

No - never used

9.10 Other expenditure

{Ask all}

SPEN

SHOWCARD QQ

(Excluding anything you have already told me about) since the beginning of this academic year, have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) personally bought and paid for any items listed on this card which cost you more than £50. Which ones?

CODE ALL THAT APPLY. USE 'F6' TO SCROLL TO SEE ALL CODES

Computer equipment, used mainly for things other than your course

Bicycle

Moped/motorcycle

Car/van

Television/ Video recorder/DVD player

CD player/hi-fi equipment/radio/personal stereo/iPod

CDs/DVDs/videos/downloadable music etc

Games console

TV licence

Washing machine/tumble dryer/fridge/other consumer durable

Furniture/carpet/bedding

Photographic equipment - not used mainly for your course

Glasses/contact lenses

Dental or medical treatment (including prescription costs and medical insurance)

Small household appliances costing more than £50

Sports equipment costing more than £50 - not used mainly for your course

Mobile phone

Buildings/household or contents insurance

Gifts for others over £50

Anything else over £50 (SPECIFY)

None of these (code if spontaneously mentioned)

{Repeat for each item mentioned above}

SPENA

How much did you pay for (NAME OF ITEM) ?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate

Numeric: Range 51 to 20,000

- Add amounts:
- XENTER/XLIVING/XSPEND - Computer equipment, not used mainly for your course
- XLIVTRAV/XLIVING/XSPEND - Bicycle
- XLIVTRAV/XLIVING/XSPEND - Moped/motorcycle
- XLIVTRAV/XLIVING/XSPEND - Car/van
- XENTER/XLIVING/XSPEND - Television/ Video recorder/DVD player
- XENTER/XLIVING/XSPEND - CD player/hi-fi equipment/radio/personal stereo/iPod
- XENTER/XLIVING/XSPEND - CDs/DVDs/videos/downloadable music etc
- XENTER/XLIVING/XSPEND - Games Console
- XENTER/XLIVING/XSPEND - TV licence
- XHHGOOD/XLIVING/XSPEND - Washing machine/tumble dryer/fridge/other consumer durable
- XHHGOOD/XLIVING/XSPEND - Furniture/carpet/bedding
- XENTER/XLIVING/XSPEND - Photographic equipment - not used mainly for your course
- XPERS/XLIVING/XSPEND - Glasses/contact lenses
- XPERS/XLIVING/XSPEND - Dental or medical treatment (including prescription costs and medical insurance)
- XHHGOOD/XLIVING/XSPEND - Small household appliances costing more than £50
- XENTER/XLIVING/XSPEND - Sports equipment costing more than £50 - not used mainly for your course
- XPERS/XLIVING/XSPEND - Mobile phone
- XOTHHOUS/XHOUSE/XSPEND - Buildings/household or contents insurance
- XPERS/XLIVING/XSPEND - Gifts for others over £50
- XOTHLIV/XLIVING/XSPEND - Anything else over £50 (SPECIFY)

{Ask all}

SPENF

SHOWCARD QQ

And between now and the end of the academic year, do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) expect to buy any items listed on this card which will cost you more than £50?

CODE ALL THAT APPLY. USE 'F6' TO SCROLL TO SEE ALL CODES

Computer equipment, used mainly for things other than your course

Bicycle

Moped/motorcycle

Car/van

Television/ Video recorder/DVD player

CD player/hi-fi equipment/radio/personal stereo/iPod

CDs/DVDs/videos/downloadable music etc

Games console

TV licence

Washing machine/tumble dryer/fridge/other consumer durable

Furniture/carpet/bedding

Photographic equipment - not used mainly for your course

Glasses/contact lenses

Dental or medical treatment (including prescription costs and medical insurance)

Small household appliances costing more than £50

Sports equipment costing more than £50 - not used mainly for your course

Mobile phone

Buildings/household or contents insurance

Gifts for others over £50

Anything else over £50 (SPECIFY)

None of these (code if spontaneously mentioned)

- Add amounts:
- XENTER/XLIVING/XSPEND - Computer equipment, not used mainly for your course
- XLIVTRAV/XLIVING/XSPEND - Bicycle
- XLIVTRAV/XLIVING/XSPEND - Moped/motorcycle
- XLIVTRAV/XLIVING/XSPEND - Car/van
- XENTER/XLIVING/XSPEND - Television/ Video recorder/DVD player
- XENTER/XLIVING/XSPEND - CD player/hi-fi equipment/radio/personal stereo/iPod

- XENTER/XLIVING/XSPEND - CDs/DVDs/videos/downloadable music etc
- XENTER/XLIVING/XSPEND - Games Console
- XENTER/XLIVING/XSPEND - TV licence
- XHHGOOD/XLIVING/XSPEND - Washing machine/tumble dryer/fridge/other consumer durable
- XHHGOOD/XLIVING/XSPEND - Furniture/carpet/bedding
- XENTER/XLIVING/XSPEND - Photographic equipment - not used mainly for your course
- XPERS/XLIVING/XSPEND - Glasses/contact lenses
- XPERS/XLIVING/XSPEND - Dental or medical treatment (including prescription costs and medical insurance)
- XHHGOOD/XLIVING/XSPEND - Small household appliances costing more than £50
- XENTER/XLIVING/XSPEND - Sports equipment costing more than £50 - not used mainly for your course
- XPERS/XLIVING/XSPEND - Mobile phone
- XOTHHOUS/XHOUSE/XSPEND - Buildings/household or contents insurance
- XPERS/XLIVING/XSPEND - Gifts for others over £50
- XOTHLIV/XLIVING/XSPEND - Anything else over £50 (SPECIFY)

{Repeat for each item mentioned above}

SPENAF

How much do you expect to pay for (NAME OF ITEM) ?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate

Numeric: Range 51 to 20,000

{Ask all}

SOLD

SHOWCARD **RR**

Since the beginning of the academic year have you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) sold any of the items listed on this card, or any other personal possessions, for more than £50?

CODE ALL THAT APPLY.

Computer equipment, used mainly for things other than your course

Bicycle

Moped/motorcycle

Car/van

Television/ Video recorder/DVD player

CD player/hi-fi equipment/radio/personal stereo/iPod

CDs/DVDs/videos/downloadable music etc

Games console

Washing machine/tumble dryer/fridge/other consumer durable

Furniture/carpet/bedding

Photographic equipment - not used mainly for your course

Small household appliances costing more than £50

Sports equipment costing more than £50 - not used mainly for your course

Mobile phone

Anything else over £50 (SPECIFY)

None of these (Code if spontaneously mentioned)

SOLDA

{Repeat for each item mentioned above}

How much did you receive for the sale of (NAME OF ITEM) ?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate

Numeric: Range 51 to 20,000

- **XOTHINC/XINCOME** - Add amounts answered

{Ask all}

OTHPAY

Apart from the things we have already talked about, do you (IF MARRIED OR HAS SHARED FINANCIAL RESPONSIBILITY WITH A PARTNER: or your spouse/partner) make any other payments on a regular basis, such as life assurance, pensions, or investment savings or a mortgage for a property in which you are not actually living?

Yes

No

{Ask students who make other regular payments}

OTHPAYAM

How much does this payment/payments come to over the academic year, including vacations?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate

Numeric: Range 1 to 50000

10 STUDENT BELIEFS/ATTITUDES

{Ask all}

I'd now like to ask about your opinions and some background information

Continue

10.1 General statements

{Ask full-time students}

FTATT

SHOWCARD **SS**

To what extent do you agree or disagree with the following statements

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

Not applicable

-
- My course is equipping me for the demands of working life
-
- I nearly did not come to university because I was concerned about the debts I would build up
- I am worried that the growing number of graduates will make it hard for me to get a graduate job
- I think that I will earn more as a result of being in Higher Education
- Most of the people I know go to or have gone to university
- I think that in the long term the benefits of Higher Education are greater than the costs

{Ask part-time students and OU students}

PTATT

SHOWCARD **SS**

To what extent do you agree or disagree with the following statements

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

Not applicable

-
- My course is equipping me for the demands of working life
-
- I nearly did not come to university because I was concerned about the debts I would build up
- I am worried that the growing number of graduates will make it hard for me to get a graduate job
- I think that I will earn more as a result of being in Higher Education
- Most of the people I know go to or have gone to university
- I think that in the long term the benefits of Higher Education are greater than the costs

11 BACKGROUND

11.1 Remaining student background

11.1.1 Previous education

{Ask all}

QUAL1

What type of school did you attend for most of the time between the ages of 11 to 16 - was it a state school, including grant maintained, or was it another type of school, for example an independent or private school?

State (including grant maintained)

Other (e.g. independent or private school)

{Ask all}

QUAL2

SHOWCARD TT

Which of these was your highest qualification before studying at (university/college/Open University)?

Foundation Year

Foundation Degree

A levels (including A2 and AS levels) or International Bacclaureate

Scottish highers

GNVQ/NVQ Level 3/ AVCEs

GCSEs/O Levels

BTEC National Diploma

Qualification from an Access course

Other (specify)

{Ask students who have gained an "other" qualification}

QUAL2S

WRITE IN DETAILS OF HIGHEST QUALIFICATION

PROBE FOR

- FULL NAME OF QUALIFICATION

- SUBJECT AREA

- LENGTH OF COURSE/TRAINING

- WHERE COURSE/TRAINING TOOK PLACE

Opentype answer

11.1.2 Parental HE background

{Ask all}

HEPAR1

Did either of your parents stay on at school after the age of 16?

INTERVIEWER, IF NEEDED: Please include step-parents if you feel you have been brought up by them.

Yes

No

{Ask all}

HEPAR2

Have either of your parents attended a university or college of higher education, including polytechnics?

INTERVIEWER, IF NEEDED: Please include step-parents if you feel you have been brought up by them.

Yes

No

11.1.3 NS-SEC (or student background)

Full-time students who are independent students

{Ask full-time students who are independent students}

Awork1

I would now like to ask you a bit about your background. Before starting this college course, had you ever been in paid work?

Yes

No.

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}

Awork2

I'd like to ask you now about your last job before starting the course.

What did the firm/organisation mainly make or do

INTERVIEWER: Enter full description.

Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}

Awork3

What was your (main) job?

INTERVIEWER: Enter job title. If has more than one job, the main job is the one they work/worked in the most hours/ if work/worked in both jobs for the same number of hours the main job is the most remunerative.

Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}

Awork4

What did you mainly do in your job?

INTERVIEWER: Describe fully - Probe for details of what they do/did. For example, if a teacher, probe for whether teach primary or secondary pupils. If an engineer, probe for type of engineer - electrical, chemical, civil etc.

Enter description.

Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}

Awork5

What training or qualifications were needed for that job?

INTERVIEWER: Enter full description, including grade or level where appropriate.

Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}

Awork6

Were you an employee or were you self-employed in this job?

Employee

Self-employed

{Ask full-time students who are independent students. Ask those who had been in paid work before the course}

Awork7

Were you working full-time or part-time?

Full-time

Part-time

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were an employee}

Awork8

Did you have formal responsibility for supervising the work of other employees?

INTERVIEWER: Do not include people who only supervise:-

- Children, e.g. teachers, nannies, childminders

- Animals

- Security or buildings, e.g. caretakers, security guards

Yes

No

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were an employee. And if has responsibility for supervision}

Awork9

Please describe the type of responsibility you had for supervising the work of other employees?

INTERVIEWER: Probe for who and what is being supervised. PROBE 'WHAT ELSE?' UNTIL FINAL 'NOTHING ELSE'.

Open type answer

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were an employee}

Awork10

How many employees were there at the place where you worked?

INTERVIEWER: This is the total number of employees within the 'local unit' at which the respondent works (the location where their job is mainly carried out). Normally this is a single building, part of a building, or at the largest, a self-contained

group of buildings.

1-9

10-24

25-499

500 or more

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were self-employed}

AWork11

INTERVIEWER: Ask or code:

Were you working on your own or did you have any employees?

On own/with partner(s), but no employees

With employees

{Ask full-time students who are independent students. Ask those who had been in paid work before the course. And if they were self-employed and has employees}

AWork12

How many people did you employ at the place where you worked?

1-9

10-24

25-499

500 or more

Full-time students who are dependent students

{Ask full-time students who are dependent students}

Bwork1

I would now like to ask you a bit about your background. Please think about the person who was the main income earner in your household just prior to starting your current course. First can I check, had they ever been in paid work before you started your current course?

Yes

No

{Ask full-time students who are dependent students}

Bwork2

Still thinking about the main income earner, I'd like to ask about their occupation just prior to you starting your course...

What did the firm/organisation mainly make or do where he/she worked?

INTERVIEWER: Enter full description.

Open type answer

{Ask full-time students who are dependent students.}

Bwork3

What was his/her (main) job?

INTERVIEWER: Enter job title. If has more than one job, the main job is the one they work/worked in the most hours/ if work/worked in both jobs for the same number of hours the main job is the most remunerative.

Open type answer

{Ask full-time students who are dependent student }

Bwork4

What did he/she mainly do in his/her job?

INTERVIEWER: Describe fully - Probe for details of what they do/did. For example, if a teacher, probe for whether teach primary or secondary pupils. If an engineer, probe for type of engineer - electrical, chemical, civil etc.

Enter description.

Open type answer

{Ask full-time students who are dependent students }

Bwork5

What training or qualifications were needed for that job?

INTERVIEWER: Enter full description, including grade or level where appropriate.

Open type answer

{Ask full-time students who are dependent students}

Bwork6

Was he/she an employee or was he/she self-employed in this job?

Employee

Self-employed

{Ask full-time students who are dependent students}

Bwork7

Was he/she working full-time or part-time?

Full-time

Part-time

{Ask full-time students who are dependent students. And if they were an employee}

Bwork8

Did he/she have formal responsibility for supervising the work of other employees?

INTERVIEWER: Do not include people who only supervise:-

- Children, e.g. teachers, nannies, childminders

- Animals

- Security or buildings, e.g. caretakers, security guards

Yes

No

{Ask full-time students who are dependent students. And if they were an employee. And if has responsibility for supervision}

Bwork9

Please describe the type of responsibility he/she had for supervising the work of other employees?

INTERVIEWER: Probe for who and what is being supervised. PROBE 'WHAT ELSE?' UNTIL FINAL 'NOTHING ELSE'.

Open type answer

{Ask full-time students who are dependent students. And if they were an employee}

Bwork10

How many employees were there at the place where he/she worked?

INTERVIEWER: This is the total number of employees within the 'local unit' at which the person works (the location where their job is mainly carried out). Normally this is a single building, part of a building, or at the largest, a self-contained

group of buildings.

1-9

10-24

25-499

500 or more

{Ask full-time students who are dependent students. And if they were self-employed}

BWork11

INTERVIEWER: Ask or code:

Was he/she working on his/her own or did he/she have any employees?

On own/with partner(s), but no employees

With employees

{Ask full-time students who are dependent students. And if they were self-employed and has employees}

BWork12

How many people did he/she employ at the place where he/she worked?

1-9

10-24

25-499

500 or more

Part-time students and OU students

{Ask **part-time students and OU students**}

Cwork1a

I would now like to ask you a bit about your background. Are you currently working?

Yes

No

{Ask **part-time students and OU students, who are not currently working**}

Cwork1b

Before starting this college course, had you ever been in paid work?

Yes

No.

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course}

Cwork2

TEXTFILL: IF CURRENTLY WORKING: I'd like to ask you now about your *current* job.

TEXTFILL: IFNOT CURRENTLY WORKING, BUT HAS IN THE PAST: I'd like to ask you now about your *last* job before starting the course.

What does/did the firm/organisation mainly make or do?

INTERVIEWER: Enter full description.

Open type answer

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course}

Cwork3

What is/was your (main) job?

INTERVIEWER: Enter job title. If has more than one job, the main job is the one they work/worked in the most hours/ if work/worked in both jobs for the same number of hours the main job is the most remunerative.

Open type answer

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course}

Cwork4

What do/did you mainly do in your job?

INTERVIEWER: Describe fully - Probe for details of what they do/did. For example, if a teacher, probe for whether teach primary or secondary pupils. If an engineer, probe for type of engineer - electrical, chemical, civil etc.

Enter description.

Open type answer

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course}

Cwork5

What training or qualifications are/were needed for that job?

INTERVIEWER: Enter full description, including grade or level where appropriate.

Open type answer

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course}

Cwork6

Are/were you an employee or are/were you self-employed in this job?

Employee

Self-employed

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course}

Cwork7

Are/were you working full-time or part-time?

Full-time

Part-time

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course. And if they were an employee}

Cwork8

Do/did you have formal responsibility for supervising the work of other employees?

INTERVIEWER: Do not include people who only supervise:-

- Children, e.g. teachers, nannies, childminders
- Animals
- Security or buildings, e.g. caretakers, security guards

Yes

No

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course. And if they were an employee. And if has responsibility for supervision}

Cwork9

Please describe the type of responsibility you have/had for supervising the work of other employees?

INTERVIEWER: Probe for who and what is being supervised. PROBE 'WHAT ELSE?' UNTIL FINAL 'NOTHING ELSE'.

Open type answer

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course. And if they were an employee}

Cwork10

How many employees are/were there at the place where you work/worked?

INTERVIEWER: This is the total number of employees within the 'local unit' at which the respondent works (the location where their job is mainly carried out).

Normally this is a single building, part of a building, or at the largest, a self-contained

group of buildings.

1-9

10-24

25-499

500 or more

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course. And if they were self-employed}

CWork11

INTERVIEWER: Ask or code:

Are/were you working on your own or do/did you have any employees?

On own/with partner(s), but no employees

With employees

{Ask **part-time students and OU students**. Ask those who are or had been in paid work before the course. And if they were self-employed and has employees}

CWork12

How many people do/did you employ at the place where you worked?

1-9

10-24

25-499

500 or more

11.1.4 Parental income

{Ask dependent students}

MDINC1

SHOWCARD UU

You are considered to be a dependent student when/if the Local Authority (or Student Loans Company) assesses any financial support you should receive.

Therefore I would now like to ask a little about your parent's/step-parents' income. What is his/her/their main source of income?

INTERVIEWER IF NEEDED: We mean the main source of income for parents/step-parents who would be/were assessed for any student support, probably the people you lived with prior to your course.

Paid work

Benefits

Student grant/loan

Income from a pension

Interest from investments

Other

{Ask dependent students}

MDINC2

SHOWCARD **VV**

Could you tell me into which of these bands your parents'/step-parents' total annual income falls - by income we mean income from all sources, including benefits, earnings from employment, pensions, gifts of money and so on. You can tell me their income either gross, that is before tax and deductions, or net, that is after deductions for tax and national insurance?

INTERVIEWER: If you are not sure of the exact amount, please give your best estimate.

INTERVIEWER IF NEEDED: We mean the income for parents/step-parents who would be/were assessed for any student support, probably the people you lived with prior to your course.

- A. up to £5,000
- B. £5,001 to £10,000
- C. £10,001 to £15,000
- D. £15,001 to £20,000
- E. £20,001 to £25,000
- F. £25,001 to £30,000
- G. £30,001 to £40,000
- H. £40,001 to £50,000
- I. £50,001 or more

{Ask dependent students who have given a banded figure for parents' income}

MDNET2

SPECIFY GROSS OR NET

Gross

Net

11.2 Other

{Ask students who lived in Wales before their course}

WELID

SHOWCARD **WW**

What do you consider your national identity to be. Please choose your answer from the card - choose as many or as few as apply?

CODE ALL THAT APPLY

Welsh

English

Scottish

British

Other

{Ask students who lived in Wales before their course who say "other" national identity}

WELIDSP

How would you describe your national identity?

WRITE IN VERBATIM

Open answer

{Ask all}

ETH

SHOWCARD **XX**

To which of these groups do you consider you belong?

INTERVIEWER: This is a question of respondent's opinion.

White - British

White - Irish

Any other white background (please describe)

Mixed - White and Black Caribbean

Mixed - White and Black African

Mixed - White and Asian

Any other mixed background (please describe)

Asian or Asian British - Indian

Asian or Asian British - Pakistani

Asian or Asian British - Bangladeshi

Any other Asian/Asian British background (please describe)

Black or Black British - Caribbean

Black or Black British - African

Any other Black/Black British background (please describe)

Chinese

Any other (please describe)

{Ask if an "other" ethnic group is given}

ETHOTH

Please can you describe your ethnic group?

INTERVIEWER: ENTER DESCRIPTION OF ETHNIC GROUP.

Open answer: up to 100 characters

{Ask all}

DISAB

SHOWCARD **YY**

Do any of the descriptions on this card apply to you?

CODE ALL THAT APPLY

I have dyslexia

I am blind/partially sighted

I am deaf/have a hearing impairment

I am a wheelchair user/have mobility difficulties

I use personal care support

I have mental health difficulties

I have an unseen disability e.g. diabetes, epilepsy, asthma

I have multiple disabilities

I have a disability not listed above

None (Code if spontaneously mentioned)

{Ask all}

SEX

RECORD RESPONDENT'S SEX:

Male

Female

{Ask all}

RELIG

What is your religion?

No religion

Christian (including C of E, Catholic, Protestant and all other Christian denominations)

Buddhist

Sikh

Muslim

Hindu

Jewish

Other

11.3 Re- contacting

{Ask all}

THANK1

We have now finished the interview with you and I would like to leave a diary of spending with you to fill in for the next seven days

INTERVIEWER BRIEF STUDENT ABOUT THE EXPENDITURE DIARY

Continue

{Ask all}

THANK2

Thank you very much for your help and for answering the questions. For quality purposes some interviews in a survey are checked to make sure that people like yourself are satisfied with the way the interview was carried out. Your contact details may be used so that someone at National Centre for Social Research can contact you about this in the future.

CODE 1 AND CONTINUE

SPONTANEOUS ONLY: USE IF RESPONDENT NOT HAPPY FOR THIS RECONTACT

{Ask all}

RECONT

Would you be happy to be re-contacted by one of the organisations that make up the research team on this survey to be asked to take part in future research?

Yes

No

{If happy to be re-contacted at THANK2 or RECONT}

ARF

INTERVIEWER: CHECK THE DETAILS ON THE ARF ARE CORRECT

- Name
- Address and telephone number
- Mobile telephone number

Ask all}

LINKB

[SHOWCARD ZZ]

And finally, more could be learnt about students and their qualifications and finances by linking your answers from these questions to administrative records held by the Department for Children, Schools and Families, Higher Education Statistics Agency and Student Loans Company. The linkage will be made in accordance with the Data Protection Act by an independent research organisation. **This linked information will only be used for research purposes in line with the Act.**

Could we have your consent for these records to be linked to your answers?

INTERVIEWER: Use F9 help-screen for a summary of the showcard information.

{The screen below is accessible if required and repeats showcard information}

F9 Interviewer note:

Department for Children Schools and Families (DCSF)

Survey data would be linked with the National Pupil Database which contains information about pupils and their qualifications that has been collected from schools and qualification awarding bodies. This would allow researchers to learn more about how students move from school to higher education.

Higher Education Statistics agency (HESA)

HESA is the agency responsible for collecting, analysing and publishing statistics about higher education in the UK. Linking to HESA data would allow information such as the qualification you are aiming towards and your degree result to be used alongside the survey information. This would allow researchers to better understand how the findings of this survey relate to higher education students as a whole.

Student Loans company (SLC)

Linking to SLC data would allow information about your application for support to your Local Authority or the SLC and the exact record of the financial support you receive to be used alongside the survey information. This would allow researchers to better understand how financial support affects students' experiences of higher education.

Yes

No

APPENDIX F EXAMPLE SHOWCARDS

The following section shows examples of the CAPI showcards.

SHOWCARD B

1. Bachelor degree e.g. any BA, BSc, BEd or BA Ed
2. Foundation degree
3. PGCE / Initial Teacher Training
4. Dip HE (Diploma of Higher Education)
5. HND (Higher National Diploma)
6. HNC (Higher National Certificate)
7. Certificate of Higher Education
8. University Certificate
9. University Diploma
10. Other, e.g. any postgraduate course other than PGCE, any qualification below University Certificate/Diploma

SHOWCARD C.2 (ENGLAND)

	If you started studying before September 2006 ('old system' students)...	If you started studying in September 2006 or later ('new system' students) and...
...then the maximum tuition fees you pay for this academic year are...	£1225	£3070
...and you may receive this government support to help pay for your fees (usually paid direct to your college or university)...	<ul style="list-style-type: none"> • ...a grant towards tuition fees. You will not have to pay this back, and the amount you get is dependent on your or your parents' income. • a Student Loan for fees. You will have to pay this back. 	<ul style="list-style-type: none"> • a Student Loan for fees. You will have to pay this back.

SHOWCARD C.3 (WALES)

	If you started studying before September 2006 ('old system' students)...	If you started studying in September 2006 or later ('new system' students) and...	
		...you were living in Wales before you started the course...	...you were living in England before you started the course...
then the maximum tuition fees you pay for this academic year are...	£1225	£3070	£3000
...and you may receive this government support to help pay for your fees (usually paid direct to your college or university)...	<ul style="list-style-type: none"> • ...a grant towards tuition fees. You will not have to pay this back, and the amount you get is dependent on your or your parents' income. • a Student Loan for fees. You will have to pay this back. 	<ul style="list-style-type: none"> • ...a grant of £1845 towards tuition fees. If you apply for a Student Loan, you will receive this automatically. You do not have to pay this back. • a Student Loan for fees. You will have to pay this back. 	<ul style="list-style-type: none"> • a Student Loan for fees. You will have to pay this back.

SHOWCARD F (FULL-TIME/PGCE – Studying in England)

ALL PAID THROUGH YOUR LOCAL AUTHORITY OR THE STUDENT LOAN COMPANY:

Basic Student Loan for Maintenance

- Applications are made through your Local Authority (or Student Loans Company).
- Up to £4,510 may be paid in three instalments to your bank or building society account (£3,495 for those living at home or £6,320 if you live in London).
- Loan is paid directly to you to cover your living costs.

Extra weeks allowance (with the student loan)

- Extra amount of loan to cover each extra week of a course above 30 weeks.
- £79 extra a week (£52 a week for those living at home and £100 extra per week if you live in London).

Maintenance Grant

- Applications are made through your Local Authority or Student Loans Company in some areas
- Non-repayable, up to £2,765

Special Support Grant

- Applications are made through your Local Authority or Student Loans Company in some areas
- Covers course-related costs such as books, equipment, travel or childcare. Non-repayable, up to £2,765

Higher Education Grant

- Helps with the costs of higher education for students who started their course on or after 1st September 2004.
- Up to £1000 paid alongside your student loan in three instalments. This does not need to be paid back.

Assembly Learning Grant for Welsh Students

- Extra support for students who usually live in Wales who may be experiencing financial difficulty.
- The Local Authority (or Student Loans Company) will pay a grant of up to £1,500 or £2,765 (depending on when you started your course) in three instalments.

Childcare Grant

- non-repayable help towards the cost of registered and approved childcare.
- Up to £148.75 a week for one child or up to £255 a week for 2 or more children. The amount you receive depends on the actual cost of your childcare and your circumstances.

Parents' Learning Allowance

- Non repayable help with course related costs.
- Up to £1,435 a year depending on your circumstances.

Disabled Students' Allowances (DSAs)

- Help with the extra costs you may have as a result of undertaking your course and as a direct result of your disability.
- May be money given directly to you or may be in the form of specialist equipment (when the supplier is paid on your behalf). Non-repayable.

Adult Dependants' Grant

- Help if you have an adult in your household who depends on you financially. This will not need to be paid back.
- Up to £2,510 a year paid alongside your student loan in three instalments.

Teacher training funds in England

- Up to £6000 as a Training Bursary. This might be paid as monthly instalments over nine months and would be arranged by your teacher training college.
- Students training to be secondary school teachers in certain priority subjects can receive up to £9,000.

Extra travel related to the course (with the student loan)

- Grant towards costs for travel to and from clinical training for medical/dental students or to another country (if studying abroad)

SHOWCARD G (FULL-TIME/PGCE – Studying in England)

SUPPORT PAID IN OTHER WAYS:

Bursaries from your college or University

- Non-repayable, extra financial help for (usually low-income) students from your college or university
- From 2007/08, minimum of £305. Can be provided in different ways, e.g. cash or discounted accommodation costs

Scholarships from your college or University

- Non-repayable, extra financial help for students from your college or university
- May be based on A level grades, subject studied, where you live etc.

Access To Learning Funds in England

- Available through universities and colleges to provide help for students who need extra financial support (previously these were called hardship funds).

Career Development Loan

- For students who can't get support from a Local Authority (or Student Loans Company) it is possible to apply to certain banks for a Career Development Loan to cover course fees, books, materials and other related expenses.
- Loan could be between £300 and £8000.

Socrates-Erasmus

- Students taking part in the Socrates-Erasmus exchange programme and studying abroad may receive money to assist with the extra costs of studying abroad.

Educational trusts and charities

- Some educational trusts and charities give other financial support to students.

Other grants/allowances

- Any other grants or allowances that a student may receive from a university, college or other organisation.

SHOWCARD H (FULL-TIME/PGCE – Studying in Wales)

ALL PAID THROUGH YOUR LOCAL AUTHORITY OR THE STUDENT LOAN COMPANY:

Basic Student Loan for maintenance

- Applications are made through your Local Authority (or Student Loans Company).
- Up to £4,510 may be paid in three instalments to your bank or building society account (£3,495 for those living at home or £6,320 if you live in London).

Extra weeks allowance (with the student loan)

- Extra amount of loan to cover each extra week of a course above 30 weeks.
- £79 extra a week (£52 a week for those living at home and £100 extra per week if you live in London).

Maintenance Grant

- Applications are made through your Local Authority or Student Loans Company in some areas
- Non-repayable, up to £2,765

Special Support Grant

- Applications are made through your Local Authority or Student Loans Company in some areas
- Covers course-related costs such as books, equipment, travel or childcare. Non-repayable, up to £2,765

Higher Education Grant

- Helps with the costs of higher education for students who started their course on or after 1st September 2004.
- Up to £1000 paid alongside your student loan in three instalments. This does not need to be paid back.

Assembly Learning Grant for Welsh Students

- Extra support for students who usually live in Wales who may be experiencing financial difficulty.
- The Local Authority (or Student Loans Company) will pay a grant of up to £1,500 or £2,765 (depending on when you started your course) in three instalments.

Childcare Grant

- Non-repayable help towards the cost of registered and approved childcare.
- Up to £148.75 a week for one child or up to £255 a week for 2 or more children. The amount you receive depends on the actual cost of your childcare and your circumstances.

Parents' Learning Allowance

- Non-repayable help with course related costs.
- Up to £1435 a year depending on your circumstances.

Disabled Students' Allowances (DSAs)

- Help with the extra costs you may have as a result of undertaking your course and as a direct result of your disability.
- May be money given directly to you or may be in the form of specialist equipment (when the supplier is paid on your behalf). Non-repayable.

Adult Dependants' Grant

- Help if you have an adult in your household who depends on you financially. This will not need to be paid back.
- Up to £2,515 a year paid alongside your student loan in three instalments.

Teacher training funds in Wales

- Up to £6000 as a Training Grant. This might be paid as monthly instalments over nine months and would be arranged by your teacher training college. Students training to be secondary school teachers in certain priority subjects can receive up to £9,000 as a Training Grant.
- Up to £2,500 as part of a Teaching Grant for priority subject or £5,000 for Maths and Science.
- Secondary Undergraduate Placement Grants of up to £1000 as part of the Teacher Training Recruitment Scheme to support you in your school experience. Also available are small hardship grants called Financial Contingency Funding.
- Students may receive up to £1200 as a Welsh-Medium Incentive Supplement.

Extra travel related to the course (with the student loan)

- Grant towards costs for travel to and from clinical training for medical/dental students or to another country (if studying abroad)

SHOWCARD I (FULL-TIME/PGCE – Studying in Wales)

SUPPORT PAID IN OTHER WAYS:

Welsh Bursary Scheme or bursaries from your college or University

- Additional means-tested support from universities and colleges for students studying in Wales
- From 2006/07, minimum of £305 a year

Scholarships from your college or University

- Non-repayable, extra financial help for students from your college or university
- May be based on A level grades, subject studied, where you live etc.

Financial Contingency Funds in Wales

- Financial Contingency Funds are available through colleges to provide help for students on low income who need extra financial support (previously these were called hardship funds).

Career Development Loan

- For students who can't get support from a Local Authority (or Student Loans Company) it is possible to apply to certain banks for a Career Development Loan to cover course fees, books, materials and other related expenses.
- Loan could be between £300 and £8000.

Socrates-Erasmus

- Students taking part in the Socrates-Erasmus exchange programme and studying abroad may receive money to assist with the extra costs of studying abroad.

Educational trusts and charities

- Some educational trusts and charities give other financial support to students.

Other grants/allowances

- Any other grants or allowances that a student may receive from a university, college or other organisation.

SHOWCARD J (PART-TIME STUDENTS - In England)

PAID THROUGH YOUR LOCAL AUTHORITY, THE STUDENT LOAN COMPANY OR OPEN UNIVERSITY:

Course Grant

- Grant of up to £250 to pay for books, travel and other course costs.

Assembly Learning Grant for Welsh Students

- Extra support for students who usually live in Wales who may be experiencing financial difficulty.
- The Local Authority (or Student Loans Company) will pay a grant of up to £750 in three instalments.

Disabled Students' Allowances (DSAs)

- Help with the extra costs as a result of undertaking your course and as a direct result of your disability.
- May be money given directly to you or may be in the form of specialist equipment (when the supplier is paid on your behalf). Non-repayable.

Open University Student Assistance Fund

- An emergency fund for Open University students who are in need of immediate financial support.

Open University Crowther Fund

- A fund for Open University students to help them build on their Open University degrees by formal study, research or voluntary work.
- Does not take into account financial circumstances. Intended for those who have achieved a good OU honours degree (first or upper second-class).

Open University Computer or Internet Grant

- a grant of up to £250 to help with the purchase of a personal computer or the costs of accessing the internet

SUPPORT PAID IN OTHER WAYS:

Additional Fee Support Scheme

- Additional support available from your college or university if you receive a fee grant that does not cover the fees charged to you.

Access to Learning Funds in England

- Available through colleges to provide help for students who need extra financial support (previously these were called hardship funds).

Career Development Loan

- For students who can't get support from a Local Authority (or Student Loans Company) it is possible to apply to certain banks for a Career Development Loan to cover course fees, books, materials and other related expenses.
- Loan could be between £300 and £8000.

Socrates-Erasmus

- Students taking part in the Socrates-Erasmus exchange programme and studying abroad may receive money to assist with the extra costs of studying abroad.

Educational trusts and charities

- Some educational trusts and charities give other financial support to students.

Other grants/allowances

- Any other grants or allowances that a student may receive from a university, college or other organisation.

SHOWCARD K (PART-TIME STUDENTS – Studying in Wales)

PAID THROUGH YOUR LOCAL AUTHORITY, THE STUDENT LOAN COMPANY OR OPEN UNIVERSITY:

Course Grant

- Grant of up to £250 to pay for books, travel and other course costs.

Assembly Learning Grant for Welsh Students

- Extra support for students who usually live in Wales who may be experiencing financial difficulty.
- The Local Authority (or Student Loans Company) will pay a grant of up to £750 in three instalments.

Disabled Students' Allowances (DSAs)

- Help with the extra costs as a result of undertaking your course and as a direct result of your disability.
- May be money given directly to you or may be in the form of specialist equipment (when the supplier is paid on your behalf). Non-repayable.

Open University Student Assistance Fund

- An emergency fund for Open University students who are in need of immediate financial support.

Open University Crowther Fund

- A fund for Open University students to help them build on their Open University degrees by formal study, research or voluntary work.
- Does not take into account financial circumstances. Intended for those who have achieved a good OU honours degree (first or upper second-class).

Open University Computer or Internet Grant

- a grant of up to £250 to help with the purchase of a personal computer or the costs of accessing the internet

SUPPORT PAID IN OTHER WAYS:

Additional Fee Support Scheme

- Additional support available from your college or university if you receive a fee grant that does not cover the fees charged to you.

Financial Contingency Funds in Wales

- Financial Contingency Funds are available through colleges to provide help for students on low income who need extra financial support (previously these were called hardship funds).

Career Development Loan

- For students who can't get support from a LEA it is possible to apply to certain banks for a Career Development Loan to cover course fees, books, materials and other related expenses.
- Loan could be between £300 and £8000.

Socrates-Erasmus

- Students taking part in the Socrates-Erasmus exchange programme and studying abroad may receive money to assist with the extra costs of studying abroad.

Educational trusts and charities

- Some educational trusts and charities give other financial support to students.

Other grants/allowances

- Any other grants or allowances that a student may receive from a university, college or other organisation.

SHOWCARD V / V V

- A. Up to £5,000
- B. £5,001 to £10,000
- C. £10,001 to £15,000
- D. £15,001 to £20,000
- E. £20,001 to £25,000
- F. £25,001 to £30,000
- G. £30,001 to £40,000
- H. £40,001 to £50,000
- I. £50,001 or more

SHOWCARD ZZ

<i>Organisations holding data</i>	<i>The data to be linked with your responses</i>	<i>Purpose of linking</i>
Department for Children, Schools and Families (DCSF)	National Pupil Database: information about pupils and their qualifications that have been collected from schools and qualification awarding bodies.	To show how the survey information is related to study at school and to qualifications gained before higher education.
Higher Education Statistics agency (HESA) – this is the agency responsible for collecting, analysing and publishing statistics about higher education in the UK.	Information about higher education courses and qualification results.	To show how the survey information is related to the types of higher education courses studied for and degree results.
Student Loans company (SLC)	Information about applications for financial support.	To show how the survey information is related to financial support in higher education.

APPENDIX G DIARY

STUDENT INCOME & EXPENDITURE SURVEY 2007/08

The diary will cover spending between:

(day) / / (date / month / year)
3024 3025-026 3027-028 3029-032

and

(day) / / (date / month / year)
3033 3034-035 3036-037 3038-041

How to fill in your diary

This diary is for recording daily spending. It should be completed for the next seven days, between the dates written on the front of this booklet.

Please write in **exactly** what you spend and include **everything** that you spend.

If you spend a large amount of money on something that will last you for some time, **you should not 'even out' the expenditure**, just record it on the day you actually spend it. Don't worry if this is not a typical week.

By spend, we mean the money that you actually **pay out** during the seven days. Please **don't** include the cost of an activity that you do if you **actually pay** for it on a day not covered by the diary.

We recommend that you carry the diary around with you and jot down what you spend in the space provided on the back page. You may also find it helpful to keep receipts to refer to when filling in the diary. Please fill in the diary at the end of each day, as it will be easier than working this out at the end of the week

The diary gives you boxes in which to fill in the amount you have spent on different items each day. If an item's boxes are left blank, it will be assumed that there was no expenditure on these items.

Do include:

- Everything that you pay for, whether by cash, cheque, debit card, credit card, postal order or other means
- Things you buy for yourself and for others as gifts

Don't include:

- Anything that is given to you as a gift, e.g. a meal bought for you by a friend
- Season tickets for periods longer than a week (these are covered in the questionnaire)
- Direct debits or standing orders

If you are married or are living with a partner with whom you share financial responsibility:

- Include your spend and the spend of your partner/spouse for 'household items' and 'child-related spend'
- Include only your spend for 'travel', 'lifestyle/entertainment', 'personal items' and 'food and drink outside the home'

→ IF YOU WANT TO FILL IN AN INTERNET DIARY OF SPENDING INSTEAD OF USING THIS BOOKLET, PLEASE GO TO:

www.student-spending.com

NB You will need to use the **password** that is on the sticker to access your web-diary.



Seven-Day Diary of Spending

WRITE IN:

(day)

(date / month / year)

3051

3052-053

3054-055

3056-059

PLEASE WRITE IN AMOUNTS OF MONEY SPENT ON EACH ITEM.

TRAVEL

NB Do not include season tickets of longer than one week or vehicle maintenance

Fares paid between college or work and home	£	<input type="text"/>	:	<input type="text"/>	3060-064
Parking paid for college or work	£	<input type="text"/>	:	<input type="text"/>	3065-069
Fares paid for leisure travel	£	<input type="text"/>	:	<input type="text"/>	3070-074
Parking paid for leisure	£	<input type="text"/>	:	<input type="text"/>	3075-079
Fares paid to and from child's school/nursery etc (if applicable)	£	<input type="text"/>	:	<input type="text"/>	3080-084
Petrol for a car, van, motorbike or scooter	£	<input type="text"/>	:	<input type="text"/>	3085-089

LIFESTYLE / ENTERTAINMENT

Cinema, theatre, concerts	£	<input type="text"/>	:	<input type="text"/>	3090-094
Entry to nightclubs, discos etc	£	<input type="text"/>	:	<input type="text"/>	3095-099
Sports (spectating or participating), hobbies, clubs and societies	£	<input type="text"/>	:	<input type="text"/>	3100-104
Religious activities	£	<input type="text"/>	:	<input type="text"/>	3105-109
National lottery or betting	£	<input type="text"/>	:	<input type="text"/>	3110-114
Other entertainment (write in details below)	£	<input type="text"/>	:	<input type="text"/>	3117-121

3115-116

PERSONAL ITEMS

Spare 3122-129

NB Include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc	£	<input type="text"/>	:	<input type="text"/>	3130-134
CDs, downloaded music, DVDs, videos etc (bought or rented)	£	<input type="text"/>	:	<input type="text"/>	3135-139
Cigarettes, tobacco	£	<input type="text"/>	:	<input type="text"/>	3140-144
Newspapers, magazines, books, stationery or postage (not needed for your course)	£	<input type="text"/>	:	<input type="text"/>	3145-149
Gifts and cards e.g. for birthdays	£	<input type="text"/>	:	<input type="text"/>	3150-154
Prescriptions and other medicines	£	<input type="text"/>	:	<input type="text"/>	3155-159
Toiletries	£	<input type="text"/>	:	<input type="text"/>	3160-164

CHILD-RELATED SPEND

NB Include your own or a partner/spouse's spend on your children, or his/her children

Play school, nursery or crèche fees	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3165-169
Babysitting, child minding, au pair or nanny	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3170-174
School lunches and milk	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3175-179
Toys, children's books or other children's gifts	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3180-184
Child's outings/entertainment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3185-189
Other spending for children	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3190-194

FOOD AND DRINK OUTSIDE THE HOME

NB Include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3195-199
Beer, wine, spirits or other alcoholic drinks	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3200-204
Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3205-209

HOUSEHOLD ITEMS

NB Include your spouse's spend if you are married or your partner's spend if you share financial responsibility with them

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3210-214
Beer, wine, spirits or other alcoholic drinks bought to consume at home	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3215-219
Household goods, cleaning materials, pet food etc	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3220-224
Servicing or repairs to personal or household equipment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3225-229
Laundry or dry cleaning	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3230-234
Payments into a kitty or common pool (excluding a joint account)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3235-239

OTHER SPENDING THAT HAS NOT BEEN COVERED ELSEWHERE

Write in description:	3240-241	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3242-246
Write in description:	3247-248	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3249-253
Write in description:	3254-255	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3256-260

DAY 2

WRITE IN:

(day)

(date / month / year)

3286

3287-288

3289-290

3291-294

PLEASE WRITE IN AMOUNTS OF MONEY SPENT ON EACH ITEM.

TRAVEL

NB Do not include season tickets of longer than one week or vehicle maintenance

Fares paid between college or work and home	£	<input type="text"/>	:	<input type="text"/>	3295-299
Parking paid for college or work	£	<input type="text"/>	:	<input type="text"/>	3300-304
Fares paid for leisure travel	£	<input type="text"/>	:	<input type="text"/>	3305-309
Parking paid for leisure	£	<input type="text"/>	:	<input type="text"/>	3310-314
Fares paid to and from child's school/nursery etc (if applicable)	£	<input type="text"/>	:	<input type="text"/>	3315-319
Petrol for a car, van, motorbike or scooter	£	<input type="text"/>	:	<input type="text"/>	3320-324

LIFESTYLE / ENTERTAINMENT

Cinema, theatre, concerts	£	<input type="text"/>	:	<input type="text"/>	3325-329
Entry to nightclubs, discos etc	£	<input type="text"/>	:	<input type="text"/>	3330-334
Sports (spectating or participating), hobbies, clubs and societies	£	<input type="text"/>	:	<input type="text"/>	3335-339
Religious activities	£	<input type="text"/>	:	<input type="text"/>	3340-344
National lottery or betting	£	<input type="text"/>	:	<input type="text"/>	3345-349
Other entertainment (write in details below)	£	<input type="text"/>	:	<input type="text"/>	3352-356
<input type="text"/>					3350-351

PERSONAL ITEMS

Spare 3357-364

NB Include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc	£	<input type="text"/>	:	<input type="text"/>	3365-369
CDs, downloaded music, DVDs, videos etc (bought or rented)	£	<input type="text"/>	:	<input type="text"/>	3370-374
Cigarettes, tobacco	£	<input type="text"/>	:	<input type="text"/>	3375-379
Newspapers, magazines, books, stationery or postage (not needed for your course)	£	<input type="text"/>	:	<input type="text"/>	3380-384
Gifts and cards e.g. for birthdays	£	<input type="text"/>	:	<input type="text"/>	3385-389
Prescriptions and other medicines	£	<input type="text"/>	:	<input type="text"/>	3390-394
Toiletries	£	<input type="text"/>	:	<input type="text"/>	3395-399

CHILD-RELATED SPEND

NB Include your own or a partner/spouse's spend on your children, or his/her children

Play school, nursery or crèche fees	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3400-404
Babysitting, child minding, au pair or nanny	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3405-409
School lunches and milk	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3410-414
Toys, children's books or other children's gifts	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3415-419
Child's outings/entertainment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3420-424
Other spending for children	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3425-429

FOOD AND DRINK OUTSIDE THE HOME

NB Include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3430-434
Beer, wine, spirits or other alcoholic drinks	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3435-439
Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3440-444

HOUSEHOLD ITEMS

NB Include your spouse's spend if you are married or your partner's spend if you share financial responsibility with them

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3445-449
Beer, wine, spirits or other alcoholic drinks bought to consume at home	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3450-454
Household goods, cleaning materials, pet food etc	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3455-459
Servicing or repairs to personal or household equipment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3460-464
Laundry or dry cleaning	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3465-469
Payments into a kitty or common pool (excluding a joint account)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3470-474

OTHER SPENDING THAT HAS NOT BEEN COVERED ELSEWHERE

Write in description:	3475-476	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3477-481
Write in description:	3482-483	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3484-488
Write in description:	3489-490	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3491-495

DAY 3

WRITE IN:

(day)

3521

3522-523

3524-525

3526-529

(date / month / year)

PLEASE WRITE IN AMOUNTS OF MONEY SPENT ON EACH ITEM.

TRAVEL

NB Do not include season tickets of longer than one week or vehicle maintenance

Fares paid between college or work and home	£	<input type="text"/>	:	<input type="text"/>	3530-534
Parking paid for college or work	£	<input type="text"/>	:	<input type="text"/>	3535-539
Fares paid for leisure travel	£	<input type="text"/>	:	<input type="text"/>	3540-544
Parking paid for leisure	£	<input type="text"/>	:	<input type="text"/>	3545-549
Fares paid to and from child's school/nursery etc (if applicable)	£	<input type="text"/>	:	<input type="text"/>	3550-554
Petrol for a car, van, motorbike or scooter	£	<input type="text"/>	:	<input type="text"/>	3555-559

LIFESTYLE / ENTERTAINMENT

Cinema, theatre, concerts	£	<input type="text"/>	:	<input type="text"/>	3560-564
Entry to nightclubs, discos etc	£	<input type="text"/>	:	<input type="text"/>	3565-569
Sports (spectating or participating), hobbies, clubs and societies	£	<input type="text"/>	:	<input type="text"/>	3570-574
Religious activities	£	<input type="text"/>	:	<input type="text"/>	3575-579
National lottery or betting	£	<input type="text"/>	:	<input type="text"/>	3580-584
Other entertainment (write in details below)	£	<input type="text"/>	:	<input type="text"/>	3587-591
<input type="text"/>					3585-586

PERSONAL ITEMS

Spare 3592-599

NB Include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc	£	<input type="text"/>	:	<input type="text"/>	3600-604
CDs, downloaded music, DVDs, videos etc (bought or rented)	£	<input type="text"/>	:	<input type="text"/>	3605-609
Cigarettes, tobacco	£	<input type="text"/>	:	<input type="text"/>	3610-614
Newspapers, magazines, books, stationery or postage (not needed for your course)	£	<input type="text"/>	:	<input type="text"/>	3615-619
Gifts and cards e.g. for birthdays	£	<input type="text"/>	:	<input type="text"/>	3620-624
Prescriptions and other medicines	£	<input type="text"/>	:	<input type="text"/>	3625-629
Toiletries	£	<input type="text"/>	:	<input type="text"/>	3630-634

CHILD-RELATED SPEND

NB Include your own or a partner/spouse's spend on your children, or his/her children

Play school, nursery or crèche fees	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3635-639
Babysitting, child minding, au pair or nanny	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3640-644
School lunches and milk	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3645-649
Toys, children's books or other children's gifts	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3650-654
Child's outings/entertainment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3655-659
Other spending for children	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3660-664

FOOD AND DRINK OUTSIDE THE HOME

NB Include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3665-669
Beer, wine, spirits or other alcoholic drinks	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3670-674
Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3675-679

HOUSEHOLD ITEMS

NB Include your spouse's spend if you are married or your partner's spend if you share financial responsibility with them

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3680-684
Beer, wine, spirits or other alcoholic drinks bought to consume at home	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3685-689
Household goods, cleaning materials, pet food etc	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3690-694
Servicing or repairs to personal or household equipment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3695-699
Laundry or dry cleaning	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3700-704
Payments into a kitty or common pool (excluding a joint account)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3705-709

OTHER SPENDING THAT HAS NOT BEEN COVERED ELSEWHERE

Write in description:	3710-711	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3712-716
Write in description:	3717-718	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3719-723
Write in description:	3724-725	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3726-730

DAY 4

WRITE IN:

(day)

(date / month / year)

3746

3747-748

3749-750

3751-754

PLEASE WRITE IN AMOUNTS OF MONEY SPENT ON EACH ITEM.

TRAVEL

NB Do not include season tickets of longer than one week or vehicle maintenance

Fares paid between college or work and home	£	<input type="text"/>	:	<input type="text"/>	3755-759
Parking paid for college or work	£	<input type="text"/>	:	<input type="text"/>	3760-764
Fares paid for leisure travel	£	<input type="text"/>	:	<input type="text"/>	3765-769
Parking paid for leisure	£	<input type="text"/>	:	<input type="text"/>	3770-774
Fares paid to and from child's school/nursery etc (if applicable)	£	<input type="text"/>	:	<input type="text"/>	3775-779
Petrol for a car, van, motorbike or scooter	£	<input type="text"/>	:	<input type="text"/>	3780-784

LIFESTYLE / ENTERTAINMENT

Cinema, theatre, concerts	£	<input type="text"/>	:	<input type="text"/>	3785-789
Entry to nightclubs, discos etc	£	<input type="text"/>	:	<input type="text"/>	3790-794
Sports (spectating or participating), hobbies, clubs and societies	£	<input type="text"/>	:	<input type="text"/>	3795-799
Religious activities	£	<input type="text"/>	:	<input type="text"/>	3800-804
National lottery or betting	£	<input type="text"/>	:	<input type="text"/>	3805-809
Other entertainment (write in details below)	£	<input type="text"/>	:	<input type="text"/>	3812-816
<input type="text"/>					3810-811

PERSONAL ITEMS

Spare 3817-824

NB Include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc	£	<input type="text"/>	:	<input type="text"/>	3825-829
CDs, downloaded music, DVDs, videos etc (bought or rented)	£	<input type="text"/>	:	<input type="text"/>	3830-834
Cigarettes, tobacco	£	<input type="text"/>	:	<input type="text"/>	3835-839
Newspapers, magazines, books, stationery or postage (not needed for your course)	£	<input type="text"/>	:	<input type="text"/>	3840-844
Gifts and cards e.g. for birthdays	£	<input type="text"/>	:	<input type="text"/>	3845-849
Prescriptions and other medicines	£	<input type="text"/>	:	<input type="text"/>	3850-854
Toiletries	£	<input type="text"/>	:	<input type="text"/>	3855-859

CHILD-RELATED SPEND

NB Include your own or a partner/spouse's spend on your children, or his/her children

Play school, nursery or crèche fees	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3860-864
Babysitting, child minding, au pair or nanny	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3865-869
School lunches and milk	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3870-874
Toys, children's books or other children's gifts	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3875-879
Child's outings/entertainment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3880-884
Other spending for children	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3885-889

FOOD AND DRINK OUTSIDE THE HOME

NB Include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3890-894
Beer, wine, spirits or other alcoholic drinks	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3895-899
Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3900-904

HOUSEHOLD ITEMS

NB Include your spouse's spend if you are married or your partner's spend if you share financial responsibility with them

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3905-909
Beer, wine, spirits or other alcoholic drinks bought to consume at home	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3910-914
Household goods, cleaning materials, pet food etc	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3915-919
Servicing or repairs to personal or household equipment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3920-924
Laundry or dry cleaning	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3925-929
Payments into a kitty or common pool (excluding a joint account)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3930-934

OTHER SPENDING THAT HAS NOT BEEN COVERED ELSEWHERE

Write in description:	3935-936	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3937-941
Write in description:	3942-943	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3944-948
Write in description:	3949-950	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	3951-955

WRITE IN:

 (day)

4051

 / /

4052-053

 / /

4054-055

 (date / month / year)

4056-059

PLEASE WRITE IN AMOUNTS OF MONEY SPENT ON EACH ITEM.

TRAVEL

NB Do not include season tickets of longer than one week or vehicle maintenance

Fares paid between college or work and home	£	<input type="text"/>	:	<input type="text"/>	4060-064
Parking paid for college or work	£	<input type="text"/>	:	<input type="text"/>	4065-069
Fares paid for leisure travel	£	<input type="text"/>	:	<input type="text"/>	4070-074
Parking paid for leisure	£	<input type="text"/>	:	<input type="text"/>	4075-079
Fares paid to and from child's school/nursery etc (if applicable)	£	<input type="text"/>	:	<input type="text"/>	4080-084
Petrol for a car, van, motorbike or scooter	£	<input type="text"/>	:	<input type="text"/>	4085-089

LIFESTYLE / ENTERTAINMENT

Cinema, theatre, concerts	£	<input type="text"/>	:	<input type="text"/>	4090-094
Entry to nightclubs, discos etc	£	<input type="text"/>	:	<input type="text"/>	4095-099
Sports (spectating or participating), hobbies, clubs and societies	£	<input type="text"/>	:	<input type="text"/>	4100-104
Religious activities	£	<input type="text"/>	:	<input type="text"/>	4105-109
National lottery or betting	£	<input type="text"/>	:	<input type="text"/>	4110-114
Other entertainment (write in details below)	£	<input type="text"/>	:	<input type="text"/>	4117-121
<input type="text"/>					4115-116

PERSONAL ITEMS

Spare 4122-129

NB Include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc	£	<input type="text"/>	:	<input type="text"/>	4130-134
CDs, downloaded music, DVDs, videos etc (bought or rented)	£	<input type="text"/>	:	<input type="text"/>	4135-139
Cigarettes, tobacco	£	<input type="text"/>	:	<input type="text"/>	4140-144
Newspapers, magazines, books, stationery or postage (not needed for your course)	£	<input type="text"/>	:	<input type="text"/>	4145-149
Gifts and cards e.g. for birthdays	£	<input type="text"/>	:	<input type="text"/>	4150-154
Prescriptions and other medicines	£	<input type="text"/>	:	<input type="text"/>	4155-159
Toiletries	£	<input type="text"/>	:	<input type="text"/>	4160-164

CHILD-RELATED SPEND

NB Include your own or a partner/spouse's spend on your children, or his/her children

Play school, nursery or crèche fees	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4165-169
Babysitting, child minding, au pair or nanny	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4170-174
School lunches and milk	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4175-179
Toys, children's books or other children's gifts	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4180-184
Child's outings/entertainment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4185-189
Other spending for children	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4190-194

FOOD AND DRINK OUTSIDE THE HOME

NB Include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4195-199
Beer, wine, spirits or other alcoholic drinks	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4200-204
Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4205-209

HOUSEHOLD ITEMS

NB Include your spouse's spend if you are married or your partner's spend if you share financial responsibility with them

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4210-214
Beer, wine, spirits or other alcoholic drinks bought to consume at home	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4215-219
Household goods, cleaning materials, pet food etc	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4220-224
Servicing or repairs to personal or household equipment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4225-229
Laundry or dry cleaning	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4230-234
Payments into a kitty or common pool (excluding a joint account)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4235-239

OTHER SPENDING THAT HAS NOT BEEN COVERED ELSEWHERE

Write in description:	4240-241	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4242-246
Write in description:	4247-248	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4249-253
Write in description:	4254-255	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4256-260

DAY 6

WRITE IN:

(day)

(date / month / year)

4286

4287-288

4289-290

4291-294

PLEASE WRITE IN AMOUNTS OF MONEY SPENT ON EACH ITEM.

TRAVEL

NB Do not include season tickets of longer than one week or vehicle maintenance

Fares paid between college or work and home	£	<input type="text"/>	:	<input type="text"/>	4295-299
Parking paid for college or work	£	<input type="text"/>	:	<input type="text"/>	4300-304
Fares paid for leisure travel	£	<input type="text"/>	:	<input type="text"/>	4305-309
Parking paid for leisure	£	<input type="text"/>	:	<input type="text"/>	4310-314
Fares paid to and from child's school/nursery etc (if applicable)	£	<input type="text"/>	:	<input type="text"/>	4315-319
Petrol for a car, van, motorbike or scooter	£	<input type="text"/>	:	<input type="text"/>	4320-324

LIFESTYLE / ENTERTAINMENT

Cinema, theatre, concerts	£	<input type="text"/>	:	<input type="text"/>	4325-329
Entry to nightclubs, discos etc	£	<input type="text"/>	:	<input type="text"/>	4330-334
Sports (spectating or participating), hobbies, clubs and societies	£	<input type="text"/>	:	<input type="text"/>	4335-339
Religious activities	£	<input type="text"/>	:	<input type="text"/>	4340-344
National lottery or betting	£	<input type="text"/>	:	<input type="text"/>	4345-349
Other entertainment (write in details below)	£	<input type="text"/>	:	<input type="text"/>	4352-356
<input type="text"/>					4350-351

PERSONAL ITEMS

Spare 4357-364

NB Include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc	£	<input type="text"/>	:	<input type="text"/>	4365-369
CDs, downloaded music, DVDs, videos etc (bought or rented)	£	<input type="text"/>	:	<input type="text"/>	4370-374
Cigarettes, tobacco	£	<input type="text"/>	:	<input type="text"/>	4375-379
Newspapers, magazines, books, stationery or postage (not needed for your course)	£	<input type="text"/>	:	<input type="text"/>	4380-384
Gifts and cards e.g. for birthdays	£	<input type="text"/>	:	<input type="text"/>	4385-389
Prescriptions and other medicines	£	<input type="text"/>	:	<input type="text"/>	4390-394
Toiletries	£	<input type="text"/>	:	<input type="text"/>	4395-399

CHILD-RELATED SPEND

NB Include your own or a partner/spouse's spend on your children, or his/her children

Play school, nursery or crèche fees	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4400-404
Babysitting, child minding, au pair or nanny	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4405-409
School lunches and milk	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4410-414
Toys, children's books or other children's gifts	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4415-419
Child's outings/entertainment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4420-424
Other spending for children	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4425-429

FOOD AND DRINK OUTSIDE THE HOME

NB Include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4430-434
Beer, wine, spirits or other alcoholic drinks	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4435-439
Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4440-444

HOUSEHOLD ITEMS

NB Include your spouse's spend if you are married or your partner's spend if you share financial responsibility with them

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4445-449
Beer, wine, spirits or other alcoholic drinks bought to consume at home	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4450-454
Household goods, cleaning materials, pet food etc	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4455-459
Servicing or repairs to personal or household equipment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4460-464
Laundry or dry cleaning	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4465-469
Payments into a kitty or common pool (excluding a joint account)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4470-474

OTHER SPENDING THAT HAS NOT BEEN COVERED ELSEWHERE

Write in description:	4475-476	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4477-481
Write in description:	4482-483	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4484-488
Write in description:	4489-490	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4491-495

DAY 7

WRITE IN:

(day)

4522-523

4524-525

4526-529

(date / month / year)

PLEASE WRITE IN AMOUNTS OF MONEY SPENT ON EACH ITEM.

TRAVEL

NB Do not include season tickets of longer than one week or vehicle maintenance

Fares paid between college or work and home	£	<input type="text"/>	:	<input type="text"/>	4530-534
Parking paid for college or work	£	<input type="text"/>	:	<input type="text"/>	4535-539
Fares paid for leisure travel	£	<input type="text"/>	:	<input type="text"/>	4540-544
Parking paid for leisure	£	<input type="text"/>	:	<input type="text"/>	4545-549
Fares paid to and from child's school/nursery etc (if applicable)	£	<input type="text"/>	:	<input type="text"/>	4550-554
Petrol for a car, van, motorbike or scooter	£	<input type="text"/>	:	<input type="text"/>	4555-559

LIFESTYLE / ENTERTAINMENT

Cinema, theatre, concerts	£	<input type="text"/>	:	<input type="text"/>	4560-564
Entry to nightclubs, discos etc	£	<input type="text"/>	:	<input type="text"/>	4565-569
Sports (spectating or participating), hobbies, clubs and societies	£	<input type="text"/>	:	<input type="text"/>	4570-574
Religious activities	£	<input type="text"/>	:	<input type="text"/>	4575-579
National lottery or betting	£	<input type="text"/>	:	<input type="text"/>	4580-584
Other entertainment (write in details below)	£	<input type="text"/>	:	<input type="text"/>	4587-591
<input type="text"/>					4585-586

PERSONAL ITEMS

Spare 4592-599

NB Include items that you have bought, even if they are not something you would normally buy in an average week

Clothes, shoes accessories etc	£	<input type="text"/>	:	<input type="text"/>	4600-604
CDs, downloaded music, DVDs, videos etc (bought or rented)	£	<input type="text"/>	:	<input type="text"/>	4605-609
Cigarettes, tobacco	£	<input type="text"/>	:	<input type="text"/>	4610-614
Newspapers, magazines, books, stationery or postage (not needed for your course)	£	<input type="text"/>	:	<input type="text"/>	4615-619
Gifts and cards e.g. for birthdays	£	<input type="text"/>	:	<input type="text"/>	4620-624
Prescriptions and other medicines	£	<input type="text"/>	:	<input type="text"/>	4625-629
Toiletries	£	<input type="text"/>	:	<input type="text"/>	4630-634

CHILD-RELATED SPEND

NB Include your own or a partner/spouse's spend on your children, or his/her children

Play school, nursery or crèche fees	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4635-639
Babysitting, child minding, au pair or nanny	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4640-644
School lunches and milk	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4645-649
Toys, children's books or other children's gifts	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4650-654
Child's outings/entertainment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4655-659
Other spending for children	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4660-664

FOOD AND DRINK OUTSIDE THE HOME

NB Include food prepared outside the home and drinks consumed outside the home

Meals/snacks (excluding alcoholic drinks) from cafes, pubs, restaurants, shops, work, take-aways, college or student union premises	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4665-669
Beer, wine, spirits or other alcoholic drinks	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4670-674
Non-alcoholic drinks (e.g. coffees, fizzy drinks, water etc)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4675-679

HOUSEHOLD ITEMS

NB Include your spouse's spend if you are married or your partner's spend if you share financial responsibility with them

Food and drink bought to consume at home (except take-away meals/alcoholic drinks)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4680-684
Beer, wine, spirits or other alcoholic drinks bought to consume at home	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4685-689
Household goods, cleaning materials, pet food etc	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4690-694
Servicing or repairs to personal or household equipment	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4695-699
Laundry or dry cleaning	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4700-704
Payments into a kitty or common pool (excluding a joint account)	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4705-709

OTHER SPENDING THAT HAS NOT BEEN COVERED ELSEWHERE

Write in description:	4710-711	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4712-716
Write in description:	4717-718	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4719-723
Write in description:	4724-725	<input type="text"/>	£	<input type="text"/>	<input type="text"/>	:	<input type="text"/>	<input type="text"/>	4726-730

Thank You

If you have any questions about this diary, please call the NatCen freephone helpline on 0800 6524574 (Mon–Fri 9.30am-5.30pm) or email sies@natcen.ac.uk.

If you are returning this diary by post please use the pre-paid envelope supplied after your interview and send to:

SIES 2007/08
Pink Team
NatCen
Kings House
101-135 Kings Road
Brentwood
Essex CM14 4LX

Space for you to make notes

DAY 1:

DAY 2:

DAY 3:

DAY 4:

DAY 5:

DAY 6:

DAY 7: