



Poverty and Social Exclusion in the UK

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**Public Perceptions of Poverty,
Social Exclusion and Living
Standards: Preliminary Report on
Focus Group Findings**

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Poverty and Social Exclusion in the UK

Overview

The Poverty and Social Exclusion in the UK Project is funded by the Economic, Science and Research Council (ESRC). The Project is a collaboration between the University of Bristol, University of Glasgow, Heriot Watt University, Open University, Queen's University (Belfast), University of York, the National Centre for Social Research and the Northern Ireland Statistics and Research Agency. The project commenced in April 2010 and will run for three-and-a-half years.

The primary purpose is to advance the 'state of the art' of the theory and practice of poverty and social exclusion measurement. In order to improve current measurement methodologies, the research will develop and repeat the 1999 Poverty and Social Exclusion Survey. This research will produce information of immediate and direct interest to policy makers, academics and the general public. It will provide a rigorous and detailed independent assessment on progress towards the UK Government's target of eradicating child poverty.

Objectives

This research has three main objectives:

- To improve the measurement of poverty, deprivation, social exclusion and standard of living
- To assess changes in poverty and social exclusion in the UK
- To conduct policy-relevant analyses of poverty and social exclusion

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Abstract

This paper reports preliminary findings from qualitative development work preparatory to the *UK Poverty and Social Exclusion Survey*. Based on 14 focus groups interviews with 114 members of the UK general public, we focus here upon conceptual and measurement issues in the operationalisation of indicators of deprivation, social exclusion and wider living standards within large-scale social surveys. A further Full Report will investigate wider public perceptions of what it means to be poor in the UK today and wider perceptions of living standards and social exclusion.

Participants' understandings of the 'necessities of life' were varied, denoting both things which households cannot do without as well as those households should not have to do without. Participants' ability to make decisions with confidence on the items which constitute the necessities of life in our society today depend partly upon the contextual information provided, for example with regard to the normative judgments implicit within such deliberations, as well as in the assessment of need (including the substitutability of deprivation items). At the same time, potential problems of cognition, judgment and response were identified in relation to some items, and suggest the need for further cognitive testing in this area.

Although poverty was central to many participants' accounts of 'social exclusion', the latter term denoted a far wider range of disadvantages than those associated with poverty. Participants appeared to engage with the term 'social exclusion' at a conceptual level with an ease and fluency which was sometimes lacking in their accounts of what it means to be poor in the UK today. Participants' accounts, including suggestions on specific indicators, referred not only to those items viewed as *detrimental* to participation, but also those which *facilitate* participation as well as wider social well-being. This might suggest further thought be given to the adequacy of "deficit" models in capturing exclusion from social relations.

Key words: poverty, social exclusion, poverty measurement, deprivation, disadvantage

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Introduction

This report describes the results of a series of fourteen focus groups conducted as part of development work for the PSE Survey. The research upon which this report is based investigates public perceptions of poverty, social exclusion and living standards in the UK today by focusing on the following topics:

1. Definitions of poverty and social exclusion
2. Items and activities considered to be indicators of deprivation and social exclusion
3. Wider views on living standards and well-being

This qualitative development work is intended to inform the design of both the NatCen Omnibus module and the main-stage PSE survey. In this Preliminary Report we focus on participants' perceptions of the 'necessities of life', that is those items and activities which everyone should be able to afford to have or do in our society today and should not have to go without. The recommendations arising from this Report will contribute to the selection of necessities indicators in the forthcoming NatCen Omnibus module. We also report preliminary findings concerning the public's perceptions of 'social exclusion' including specific suggestions and recommendations arising from these discussions with regard to the measurement of social exclusion.

A Full Report will be made available in Spring 2011 outlining findings pertinent to all of the above themes on the basis of a detailed thematic analysis of interview transcripts. In particular, issues relating to the definition of poverty, social exclusion and living standards, as well as indicators of social exclusion will be discussed in detail in the Full Report. Nevertheless, a number of emerging themes are worthy of note here and should be taken into account in the development of survey instruments.

Firstly, whilst participants' initial definitions of poverty were sometimes restrictive, their deliberations on the necessities of life in our society today often reflected much broader conceptualisations of poverty. However, for many participants the notion of 'necessities' was itself problematic given the definition of the 'necessities of life' proposed above, with 'necessities' sometimes suggesting to participants a much more restrictive interpretation of items and activities that households *cannot* go without (i.e. rather than *should not* have to go without). Some participants felt that it was difficult to distinguish between items and activities that all households 'should' be able to have, and those which low income households 'could' in fact afford.

Secondly, many participants felt that determining which specific items and activities should be considered 'necessities of life' depends upon knowledge of a range of other contextual factors concerning the household's circumstances, including wider living standards and household composition. For this reason, participants were asked to consider the situation of an exemplar household comprising a couple with dependent children in making their deliberations. Nevertheless, in rendering the decision-making process more concrete this inevitably is also a significant factor in interpreting

participants' responses which requires further investigation. The above issues require further consideration in the Full Report as they have significant implications for the ways in which the survey questions are understood by participants and interpreted by researchers.

Background

In recent years a number of studies drawing upon budget standards approaches have used focus group methods in order to develop consensual approaches to budget setting. In 1998, a major research study undertaken by the University of York using focus group methods established a minimum income standard for Britain based upon a similar consensual methodology in order to define the level of income needed to enjoy minimally acceptable living standards (Bradshaw et al., 1998). Discussion groups were conducted in order to agree a working definition of 'acceptable minimum' and to deliberate upon the household budget needed to enjoy minimally acceptable living standards for a variety of hypothetical households experiencing different circumstances. The minimum income standards set in the original research have subsequently been updated on an annual basis to take account of contemporary changes in perceptions of adequate living standards and consumer trends (Hirsh et al 2009, Davis et al 2010).

In 2010, Hirsch & Smith (2010) investigated the views of parents on 'necessities' for families with children to inform a shortlist of items to be included in the ONS Omnibus survey. Again, this research adopted a consensual approach to budgeting by convening a series of discussion groups to establish budget standards for households of different types. Participants discussed the needs of a hypothetical family with either school-age or pre-school children in relation to items which should be regarded as things that every family in Britain should be able to afford if they want them. Group discussions involved negotiation and arriving at a consensus on necessary items, social participation and leisure activities for the families in question.

The use of focus group methods in order to explore perceptions of the necessities of life has also been undertaken as part of development work preparatory to the 1999 PSE survey. A series of focus groups was undertaken by academics at the University of Loughborough with the aim of exploring whether agreement could be reached on those items and activities which all people living in Britain should be able to afford and should not have to go without. Focus group participants negotiated and agreed lists of necessities which had been developed on the basis of 1990 Breadline survey findings (Gordon and Pantazis, 1997). Participants were also asked to consider the relative importance of different items and activities and the length of time that individuals or households could go without them without falling into poverty.

Our objective in this Preliminary Report is to build upon this developing evidence base by contributing to improvement in the measurement of deprivation and living standards in the 1999 PSE survey (Gordon et al, 2001; Pantazis et al., 2006). In this Preliminary

Report we will focus upon participant's specific suggestions concerning indicators of deprivation and wider living standards in the UK today. Recommendations arising from this research will contribute directly to question development in the NatCen Omnibus 'Necessities' module to be conducted in March 2011. Based on participants own suggestions and reflections on existing indicators, we make some recommendations on the 'best' subset indicators for inclusion in the Necessities module.

Sample design

Whilst the 1999 PSE revealed a high degree of consensus in public perceptions of necessities, these clearly also depend upon household circumstances and expectations (Pantazis et al., 2000). For example, the needs of pensioner households differed from those of households with children. Similarly, low income households tended to have a more restrictive interpretation of the necessities of life compared with households enjoying higher standards of living. Perceptions of the necessities of life also varied by age group and ethnic origin.

Since the aim of focus groups is generally to achieve consensus amongst participants, variability in public perceptions of the necessities of life needs to be taken into account in the recruitment of participants. The recruitment plan was based on a quota sample design which aimed to promote homogeneity in group composition with regard to factors relevant to participants' views, including:

- income status, household type, and ethnic origin (*primary strata*)
- gender, age, housing tenure, employment status, age of children (*secondary strata*)

A total of 14 focus group interviews were conducted in November and December 2010 in five different locations, including in each of the four territories comprising the UK: Bristol, Cardiff, London, Glasgow and Belfast. Separate group interviews were conducted amongst low income samples (5 groups), non-low income samples (5 groups), and mixed income samples (4 groups). These groups were also stratified by household type (11 groups) and minority ethnic status (3 groups). The profile of the achieved sample is described in Figure 1 (*overleaf*).

Focus group interviews typically comprised 6 to 10 participants with three groups being conducted in each location¹. Each group lasted approximately 2.5 hours in total. Participants were professionally recruited and all participants received a one-off gift payment of £35 plus travel expenses in recognition for their contribution to the research. Prior to attending their group discussion, participants completed the following instrumentation:

- A recruitment survey collecting respondent socio-demographic data

¹ Unfortunately severe winter weather conditions in Glasgow made it necessary to cancel one group (with older people) and seriously affected attendance at a second group with working age adults.

- A brief open-format questionnaire on deprivation, living standards and social exclusion

The main aim of the pre-group instrumentation was to encourage participants to begin to think in advance about suitable indicators of deprivation and indicators of wider living standards in the UK today. The recruitment survey also provided useful contextual information on the socio-demographic profile of the fourteen groups. A fuller description of the sample is provided in Appendix 2. In total, 114 participants took part in the 14 group interviews of whom 54% were female and 46% male. Over half (55%) of respondents reported monthly household incomes of less than £1,500, and exactly half the sample were owner occupiers. Single person households comprised 30% of the sample, and well over half (57%) of respondents cared for dependent children.

Figure 1: Summary profile of focus groups

ID	Group Profile	N	Location
BRS1	Working age, no dep. children: non-low income. Older owner-occupiers living in detached homes, mixed sex group	8	Bristol
BRS2	Working age, no dep. children: non-low income. Mixed age group owner-occupiers, predominantly male	9	Bristol
BRS3	Pensioners: low income. Owner occupiers living in mixed dwelling types, predominantly female	9	Bristol
CDF1	Pensioners: low income. Owner occupiers living in mixed dwelling types, predominantly female	8	Cardiff
CDF2	Couples with dep. children: non-low income. Younger owner occupiers living in mixed dwelling types, mixed sex group	9	Cardiff
CDF3	Single parents: non-low income. Mixed aged group renters living in semi-detached homes, predominantly female	9	Cardiff
LDN1	Ethnic minority: mixed income. Mixed age group renters living in mixed dwelling types, mixed sex group	9	London
LDN2	Ethnic minority: low income. Mixed age group LA/HA renters living in terraced houses and flats, mixed sex group	8	London
LDN3	Ethnic minority: non-low income. Younger mixed tenure group living in varied dwelling types, mixed sex group	8	London
GLS1	Working age, no dep. children: mixed income. Younger mixed tenure group, all male group	3*	Glasgow
GLS2	Single parents: low income. Younger private renters living in mixed dwelling types, predominantly female	6*	Glasgow
NI1	Couples with dep. children: mixed income. Younger private renters living in semis and terraced dwellings, mixed sex group	9	Belfast
NI2	Single parents: low income. Mixed age group renters living in mixed dwelling types, predominantly female	9	Belfast
NI3	Couples with dep. children: mixed income. Mixed age group owner occupiers living in semis and terraced dwelling, predominantly female	10	Belfast

* Participant recruitment was affected by inclement weather conditions and transport disruption. As a result it was necessary to cancel one further group with pensioners in Glasgow

Research methods

Research was conducted in two overlapping phases. In Phase One, participants were asked to suggest potential indicators of deprivation in a relatively unstructured way using 'brainstorming' methods and based on an exercise participants were asked to complete before attending the discussion. Our aim here was to generate a consensus within groups on possible indicators based primarily upon participants own suggestions with some supplementary prompted items. Participants were asked to deliberate upon those items and activities which they considered to be necessities for a 'typical' family with children in the UK today based upon a hypothetical vignette. Sessions began by soliciting participant feedback on a selection of prompted items drawn from previous studies arranged thematically and relating to households' accommodation, diet and clothing, household items, social and family life, and children's items. Participants were encouraged to add freely to and amend items as appropriate using brainstorming methods. In each case, our objective was to seek consensus within each group on those items which everyone should be able to have or do in the UK today and should not have to go without because they cannot afford them. For these purposes, a consensus was recorded where more than half of group members agreed with inclusion of the item as a necessity, though in practice group decisions on many items were universally or near universally agreed by participants.

Drawing on participants' suggestions in the Phase One groups, the objective in the Phase Two groups was to 'test' the new and prompted items agreed by Phase One groups, as well as to explore perceptions of wider living standards in the UK today, including things which might be viewed as desirable but non-essential, or as 'luxuries'. To do so, a number of additional items and activities were selected which based upon 99PSE and 03PSENI results are *not* widely viewed as necessities by the UK public. These items were added to the Phase One results and participants were then asked to sort the combined items into three categories using card-sort methods, as follows:

- **Necessities:** things which are essential and which everyone should be able to afford if they want them in our society today
- **Desirables:** things which many or most people have access to in the UK today but which are not essential in our society today
- **Luxuries:** things which are quite costly and exclusive and which fewer people have in our society today

The group observer recorded the outcome of group deliberations, noting if (near) universal agreement or a majority verdict was reached in each case. Our expectation is that a wider consensus may exist where, using different research methods, Phase 2 groups independently classify broadly the same subset of items and activities as 'necessities' as those initially suggested in the Phase 1 groups.

In examining social exclusion, a broadly comparable approach was adopted.

Participants' initial reflections on the nature of social exclusion were explored in relation to the connections between living standards and wider 'quality of life' issues and through the use of vignette methods to illuminate participants' conceptualisations of exclusion. (These findings will be explored in the Full Report). Participants were subsequently asked to make suggestions about "*the kinds of disadvantages which might make it difficult for people to fully participate in society*" based upon brain-storming approaches (Phase 1) and card sort methods (Phase 2). Our aim in the ten Phase 1 groups was to solicit participants' own suggestions on the basis of quite wide-ranging discussion. In the four Phase 2 groups, our aim was to 'test' a range of items based upon participants' suggestions in the Phase 1 groups and existing survey items. In these groups, participants were asked to distinguish between items which were either 'essential' or 'desirable' in avoiding social exclusion.

Findings: The necessities of life

Phase 1 findings

Table 1 (*below*) lists all those items considered and agreed by participants in one or more of the Phase One groups as 'necessities of life' in the above sense. It should also be noted that the items as agreed in different groups varied (sometimes considerably) in their wording from those detailed in Table 1. The detailed comments and recommendations arising from the groups relating to specific indicators are outlined in Appendix 1.

Participants' suggestions are of course varied and wide-ranging, and in advance of a detailed thematic analysis of interview transcripts it is difficult to draw firm conclusions at this stage. However, a number of general points are worthy of brief note here. Firstly, whilst participants' suggestions are generally similar to existing 99PSE/02PSENI indicators there are some signs that certain 'traditional' indicators, for example, those associated with diet, clothing, and family life, are of declining relevance. Similarly, participants' suggestions often indicated a strong consensus in favor of electronic and communication equipment which undoubtedly reflects wider technological and social changes.

Secondly, participants made many new suggestions in terms of specific items for potential further consideration. These were inevitably diverse but those agreed by group participants often focused in various ways on security (long term financial security, insurance against risks, hazard prevention), housing quality (insulation/energy efficiency, ventilation, daylight, communal space, good physical repair), and children's well-being and development (social and school activities, education, safety). Thirdly, aside from the general definitional issues discussed above, participants' responses and queries suggest various (overt) response problems associated with specific items. These relate to participants' decision making processes, and specifically to processes of

item cognition, judgment, and response, and are outlined in detail in Appendix 1.

Table 1: The necessities of life

ACCOMMODATION

- A damp free home
- Heating to warm living areas of the home
- Insurance of home contents
- Money to keep home in decent state of decoration
- Separate bedrooms for boys and girls aged over 10
- Separate bedrooms for all adults and for parents/children
- A communal area for whole household
- Adequate natural light
- Enough space for all household members
- Bath or shower facilities
- Sole use of household facilities
- Adequate ventilation and insulation
- Draft free windows
- Smoke/carbon monoxide alarm

HOUSEHOLD ITEMS

- Washing machine
- Mobile phone
- Access to internet
- Microwave
- Fridge/freezer
- An iron
- Kettle
- Hairdryer
- Money to replace/repair broken electrical goods
- Sofa and/or easy chairs for household members
- Dining table and chairs for all household members
- Money to replace worn out furniture
- Bed, bedding, mattress for all household members
- Curtains/blinds

DIET AND CLOTHING

- Two meals a day for adults
- Meat, fish or veggie equivalent daily
- Fresh fruit and veg. on a daily basis
- An adequate balanced diet (including meat, fish, vegetables and carbs)
- Money for a week/month's household food budget
- Warm waterproof coat
- Two pairs of all weather shoes
- New, not second hand, clothes
- An outfit for special occasions
- Three complete outfits for every household member
- Adequate nightwear
- Clothes in good/clean condition
- Adequate clothing and footwear for all seasons
- Non prescription medicines

SOCIAL AND FAMILY LIFE

- Holiday away from home once a year, not with relatives
- Family or friends around for a meal
- Visits to friends or family
- An evening out once a fortnight
- A car
- Local bus or rail fares
- Access to affordable local public transport
- Family outings
- Money for local sporting activities or classes
- A family meal together once a day
- Money to celebrate special occasions
- Theatre, concert, museum, cinema visits
- Personal time for adults away from family responsibilities

Table 1: The necessities of life (Contd.)

HOUSEHOLD ITEMS (Contd.)

- Access to an outdoor space within accommodation
- Books within the home
- Home computer
- TV
- Radio or music player

CHILDREN'S ITEMS

- Three meals a day for children
- Meat, fish or veggie equivalent daily for children
- A garden for children to play in
- Books for children of their own
- Toys (e.g. dolls, teddies)
- Friends round for tea/snack fortnightly
- Leisure equipment for children
- School trips at least once a term
- Access to a safe outside area to play
- Fresh fruit or vegetables at least daily/twice daily
- Milk daily

FINANCIAL

- Paying rent/mortgage and household bills without getting into debt
- Regular savings for rainy days
- Small sum of money to spend on self weekly
- Life insurance for mortgage-holders
- Regular payments into a private or occupational pension plan
- New, properly fitted shoes for children
- Some new, not second-hand clothes for children
- School uniform for children
- Hobby or leisure activity
- Toys for personal development/education
- Toys (e.g. dolls, teddies)
- Sports equipment for children
- A mobile phone for older children
- Money for after school clubs
- Treats for children on special occasions
- Money for children's clubs, societies and related activities

Phase 2 findings

In the Phase Two groups participants were asked to classify a range of different items using card sort methods into 'necessities', and 'desirable' and 'luxury' items. Items including selected Phase One necessities and additional items intended to measure relative affluence. Table 2 (*below*) summarises results for those items which were universally agreed by all four groups as necessities (Col 1), for items viewed as necessities by a majority of the groups (Col 2), and for those identified by most groups as 'desirable' (Col 3) or 'luxury' (Col 4) items.

In general, there is a close correspondence between items universally agreed as necessities within Phase One groups and those universally classified as necessities in Phase Two. Groups of course sometimes reached different conclusions and where this is so we distinguish between universal agreement across groups (Col 1) and those classified as necessities in a majority of groups (Col 2). As might be expected given the absence of universal agreement across groups, the latter category includes many items which evoked a more equivocal response in the Phase One groups. These items (Col 2) in conjunction with items identified by most groups as 'desirable' (Col 3) are likely to

prove the most discriminating indicators in terms of identifying a deprivation threshold.

Table 2: Participant classification of standard of living items

1. NECESSITIES (universally agreed)

- Adequate nightwear (4)
- Non prescription medicines (3.5)
- Communal area for all household members (3.3)
- Three complete outfits for every hhd. member (3)
- Local bus or rail fares (3)
- A car in an area with poor public transport (3)
- Being able to celebrate special occasions (3)
- Milk daily for children (3)
- School uniform for children (3)
- A smoke/carbon monoxide alarm (2.6)

3. DESIRABLE ITEMS

- An outfit to wear for social or family occasions (1.75)
- A home computer (1.75)
- Microwave (1.75)
- A dining table and chairs for all household members (1.5)
- A DVD player (1.25)
- Enough space or privacy to read, write or listen to music (1.25)
- Small sum of money to spend on self occasionally (1.25)
- A music system or hi-fi (1)
- A garden to play in (1)

2. NECESSITIES (consensus)

- Attending local sporting or leisure classes (3.25)
- Draft free windows (2.75)
- Digital TV (2.75)
- An evening out once a fortnight (2.75)
- A treat on special occasions for children (2.75)
- Visits to cinema/theatre or other cultural event at least every three months (2.5)
- Leisure equipment (e.g. sports equipment, bike) (2.5)
- A mobile phone (2.25)
- Access to the Internet (2.25)
- A family outing once a month (2.25)
- Toys for personal development (2.25)

4. LUXURY ITEMS

- Membership of a gym or sports club (0.5)
- An iPod or MP3 Player (0.25)
- A school trip abroad once a year (0.25)
- A dishwasher (0)

NOTE: Parentheses indicate item scoring across groups. For each group, items are scored as follows: necessity (universal agreement)=1; necessity (majority decision)=0.5; desirable=0.25; luxury=0. Item scores were summed across the four groups to provide a crude ranking of participant decisions across groups.

Findings: social exclusion

Phase 1 findings

In the phase 1 groups, participants were introduced to the topic of social exclusion by asking them to consider what it meant to them to be able to fully participate in society. Participants were all familiar with the term 'social exclusion' and its common usage in public debates relating, for example, to disadvantage, deprivation, and the 'underclass'. A much fuller analysis of these issues will be explored in the Full Report. However, it is clear that whilst poverty was, to varying degrees, integral to many participants' accounts of 'social exclusion', this latter term denoted a very much wider range of disadvantages than those associated with limited material resources and its impacts. Indeed, participants appeared to engage with the term 'social exclusion' at a conceptual level with an ease and fluency which was sometimes lacking in participants' accounts of the 'necessities of life' which everyone should be able to afford in our society today.

At the same time, the items suggested by participants were not only those which they viewed as *detrimental* to participation (e.g. discrimination, incapacity, fear, etc.), but also those which *enable* participation (e.g. supportive social networks, good health, access to good quality services). This might suggest further thought be given to the extent to which a 'deficit' model focused upon exclusion from social relations is adequate in capturing positive well-being. In practice, participants' suggestions about the kinds of disadvantages which they thought would make it difficult for people to fully participate in society referred to items with both negative connotations (associated with exclusion) *and* positive suggestions relating in various ways to social well-being and quality of life. The extent to which these are simply the obverse of each other is open to debate, but at the very least it is clearly also important that researchers focus upon the development of indicators of social well-being and quality of life alongside the measurement of disadvantage and exclusion.

Participants were asked to make suggestions about "*the kinds of disadvantages which might make it difficult for people to fully participate in society*" and these suggestions are outlined in Table 3 (*below*). Participants' suggestions were wide ranging included items that encompassed the range of B-SEM themes, as detailed below.

Table 3: Participants' perspectives on social exclusion

HEALTH & WELLBEING

- Good physical and mental health
- Disabilities
- Mental illness
- Life limiting illness
- 'Healthy' spiritual life

CRIME, HARM & CRIMINALISATION

- Living in a high crime area/area with a reputation for crime and ASB
- Being unable to insure your home
- Being afraid to go outside/go out at night
- Feeling safe
- Discrimination: homophobia, racism, sexism, ageism, disability, religion
- Bullying/harassment
- Domestic violence
- Not having sufficient visible policing
- Good criminal justice system
- Having a criminal record
- People in prison

SOCIAL RESOURCES

- Low confidence and self-esteem, shyness
- Lack of social contacts
- Not living close to family/friends
- Good(ish) relations with neighbours
- Support networks (e.g. family)
- Older people who lack support
- No one to turn to in a crisis
- Poor social networks/contacts
- Good social skills
- Good communication skills

LIVING ENVIRONMENT

- Good neighbours
- Good warden-assisted accommodation
- Homelessness
- Neighbourhood Watch area
- Safe park
- Community spaces
- Sense of belonging where you live
- Good neighbours

MATERIAL/ECONOMIC RESOURCES

- Poverty
- Adequate level of income
- Able to save
- Debt (manageable debt)
- Local bank/credit union
- Bank account
- Information on finance for young people
- Sensible state pension
- Not being able to afford social activities (adults and children)
- Funding to services: charitable, disabilities, women's aid
- Living on social benefits
- Not owning your own home

ECONOMIC PARTICIPATION

- Unemployment
- Few career opportunities in the labour market
- Long and/or unsocial hours
- Working in a high stress environment
- Harassment/bullying at work
- Being in debt
- Good contributory pension scheme (employer contribution)
- Caring responsibilities

Table 3: Participants' perspectives on social exclusion (contd.)

ACCESS TO SERVICES

- Access to healthcare: emergency dept, health centres
- Affordable dental care
- Access to GP/health centre (including rural areas)
- Home care services, district nursing
- Access to local shops
- Library
- Schools/education
- Adult education
- Breakfast clubs for children
- After school clubs
- Playgroups/nurseries
- Children's centre
- Youth centre
- Leisure centre/leisure facilities
- Local sporting club/sports facilities
- Café
- Pub
- post office
- Emergency services
- Refuse collection
- Church/place of worship
- Access to community facilities
- Lack of facilities in rural areas
- Good, regular, affordable transport links
- Sufficient funding/resources for services
- Local resources/funding to set up community groups/facilities
- Good publicity about community services
- Local news source
- Access to mobile phone/internet for social contact

POLITICAL AND CIVIC PARTICIPATION

- Feeling unable to participate in or influence decision-making
- Having a say about your local area
- Community involvement
- Immigration and citizenship status
- Political participation
- Lack of community spirit

CULTURE, EDUCATION & SKILLS

- Poor education
- Qualifications, skills and work experience
- Lifelong learning opportunities
- Poor English language skills

Phase 2 findings

In the phase 2 groups, participants were asked to classify a range of different social exclusion items using card sort methods based upon a selection of items proposed in the Phase 1 groups and findings from previous surveys in this area. Participants were asked to sort the items into those that were either 'essential' or 'desirable' in avoiding social exclusion – none of these items were agreed in any of the phase 2 groups to be *neither* essential nor desirable in avoiding social exclusion.

Interestingly, across the four phase 2 groups there were no items that were universally (i.e. unanimously) considered to be essential for avoiding social exclusion by all participants. Nevertheless, in many cases a general consensus was evident across groups that certain items were essential in avoiding social exclusion, as detailed in Section 1 of Table 4 (*below*). Of these, the items that received that greatest support were: regular contact on most days with friends; workmates or neighbours; help with caring responsibilities; and good English language skills.

A much wider range of items were broadly considered to be desirable in avoiding social exclusion, or desirable but not essential in doing so - as detailed respectively in Sections 2 and 3 of Table 4 (*below*). It is difficult at this stage to draw firm conclusions with regard to the relative ranking of items since any such classification of the degree of consensus within and across groups is inevitably crude (see Table 4, note). However, much further analysis on the basis of a thematic analysis of the interview transcripts is certainly warranted in this area in exploring the relationships and interconnections between disadvantage and exclusion on the one hand, and social well-being and quality of life on the other. These issues will need to be addressed more fully in the Final Report.

Table 4: Participant classification of Phase 2 Social Exclusion Items

1. Essential to avoid social exclusion (consensus across groups)

- Regular contact on most days with friends, workmates or neighbours (0.83)
- Help with caring responsibilities (0.83)
- Good English language skills (0.83)
- Manageable debt (0.67)
- Confidence and self-esteem (0.67)
- Freedom from harassment/bullying at work (0.67)
- Good publicity about community services (0.67)
- Freedom from longstanding illness which limits your daily activities (0.66)
- Someone to turn to in a crisis (0.66)

2. Desirable to avoid social exclusion (consensus across groups)

- Good access to services (0.58)
- Good education (some qualifications/skills) (0.58)
- Feeling safe walking alone after dark in your local area (0.58)
- Freedom from verbal/physical abuse on the basis of race, ethnicity or religion (0.58)
- Freedom from verbal/physical abuse from another member of your household (0.55)
- Good mental and physical health (0.44)
- Work that is rewarding or socially valued (0.42)
- Good relations with neighbours (0.42)

3. Desirable but not essential to avoid social exclusion

- Full UK citizenship (0.33)
- Good career opportunities in the job and/or labour market in your area (0.25)
- Feeling able to influence decisions in your local area ((0.25)
- Owning your own home (0.22)
- Having no criminal record (0.22)
- Living in accommodation free from air pollution or heavy road traffic (0.17)
- Being involved in local community groups or activities in your area (0)

For each group, items are scored as follows: essential (universal agreement)=1; essential (majority decision)=0.66; desirable (majority)=0.33; desirable (universal)=0; Item scores were summed across the four groups to provide a crude ranking of participant decisions across groups.

Conclusions and recommendations

Participants' suggestions are broad in their scope and further analysis is needed to explore the public understandings of poverty and deprivation in our society today, as well as wider views on living standards and social exclusion. Nevertheless, our analyses so far raise some important issues with regard to: a) the nature and scope of participants own recommendations; b) conceptual and definitional issues in determining the necessities of life', and; c) measurement issues associated with participant decision-making processes.

Participants' suggestions and recommendations

Participants' comments and suggestions on the necessities of life in our society today were many and varied. Specific recommendations relating to individual items and activities are contained in Appendix 1. However, despite the scope of participants' suggestions, our initial findings suggest that certain 'traditional' indicators of deprivation associated with diet, clothing, and family life may be of declining relevance in the UK today. Similarly, participants' suggestions often indicated a strong consensus in favor of electronic and communication equipment which undoubtedly reflects wider technological and social changes. Participants made many new suggestions in terms of specific items for potential further consideration and those agreed by group participants often focused in various ways on security (long term financial security, insurance against risks, hazard prevention), housing quality (insulation/energy efficiency, ventilation, daylight, communal space, good physical repair), and children's well-being and development (developmental and school-related activities, education, safety). It is recommended that special consideration is given to possible inclusion of items in these topic areas.

Deprivation indicators can also be thought of as comprising a sub-set of standard of living items denoting different levels of deprivation of necessities. In terms of identifying a poverty threshold it is therefore important to include items which are sensitive discriminators, that is items which are located close to the threshold between 'necessities' and 'desirable' in the minds of participants. Those items identified as 'necessities' on the basis of a majority verdict, and those classified by participants as 'desirable' (but non-essential) are likely to prove especially sensitive measures of deprivation and living standards. It is recommended that particular emphasis is given to 'threshold' indicators of this type in the NatCen Omnibus module, including inclusion of some of these items in the survey.

Participants were also asked to make suggestions in relation to the wider forms of disadvantage which might make it difficult for people to fully participate in society. Their accounts indicate that whilst limited resources is clearly important in understanding wider forms of social exclusion, the latter term denotes a far wider range of

disadvantages, for example associated with social relations, networks, and participation, economic life, health and well-being, housing and environmental quality, and crime and social harm. In general, these suggestions provide a good 'fit' with the Bristol Social Exclusion Framework (Levitas et al., 2006). However, some suggestions such as 'a healthy spiritual life' are difficult to situate within the BSEM measurement framework. Other items, such as 'sufficient visible policing', 'funding for (voluntary) services', 'good publicity about community services', and wider issues of accessibility and affordability in service provision, draw attention to the extent to which social exclusion affects not only *personal* well-being and quality of life, but also characterizes the degree of *societal* equity and cohesion.

Definitional issues

Prior to detailed thematic analysis of interview transcripts it is difficult to draw firm conclusions at this stage, but our initial findings suggest some interesting definitional issues with regard to participants' views on the 'necessities of life'. Firstly, for some participants the term 'necessity' was itself problematic insofar as participants frequently understand this to refer to items and activities which households cannot do without rather than things that all households should be able to afford. It is therefore recommended that consideration is given to minimising reference to 'necessities' since respondents' understandings of this term do not always accord with the PSE interpretation.

Secondly, participants' ability to make meaningful decisions with confidence on these items depends partly upon the contextual information provided. In this study, participants' deliberations focused upon a hypothetical vignette describing a 'typical' family with children. Group decisions partly reflected participants' interpretations of this family's circumstances both in terms of implicit moral judgments concerning eligibility, but also in the more specific sense that for many participants the importance (need) for an item depends upon individual and household circumstances, as well as the other resources they are able to draw upon (i.e. their substitutability). Related to this, participants' deliberations inevitably raised questions about the extent to which the availability of items is important in shaping participants' decisions. This is reflected in the importance attached to local services and amenities by participants in shaping decisions about what households should be able to afford (i.e. the extent to which items may be substitutable). For example, for many participants the importance of having access to a car depends on the availability of suitable public transport

Thirdly, in comparison with discussion of the 'necessities of life' participants appeared to engage with the term 'social exclusion' at a conceptual level with an ease and fluency which was sometimes lacking in their accounts of what it means to be poor in the UK today. Participants' accounts in relation to social exclusion, including suggestions on specific indicators, referred not only to those items generally viewed as *detrimental* to participation, but also to those which *facilitate* participation and promote wider social

well-being. This might suggest further thought be given to the adequacy of “deficit” models in capturing exclusion from social relations, and in particular that more attention is paid to what it means to be *included* within society in terms of social well-being, participation, and quality of life, including through the development better measurement of these concepts within large-scale surveys in this area.

Measurement issues

In addition to the above conceptual and definitional issues, our discussions with participants revealed a number of measurement issues associated with participants’ decision-making process primarily relating to item cognition and response. It should be noted that we are only able to comment here upon *overt* problems associated with item wording on the basis of queries and comments volunteered by participants. We do not exclude the possibility that further covert problems may exist for some items, and we recommend that these and similar deprivation items are subject to full cognitive testing in future work in this area.

Item cognition issues were identified with a variety of items and further details on specific problems are outlined in Appendix 1. Problems were identified with some items where wide variations exist in the quality of items available and with the associated costs. In the absence of sufficient information which might allow participants to make informed judgments about the relevant costs involved it can be difficult for participants to deliberate on the importance of different items. Some instances where this was an especial issue includes ‘iPod or MP3 player’, ‘holidays’, and ‘outing’ where cost implications are unclear and highly variable. It is recommended that consideration is given to providing an estimate of cost for some items where these are difficult for participants to estimate. In order to aid participants’ decision making consideration could also be given to more provision of suitable examples - as well as ensuring that these are generally comparable. Similarly, the use of adjectives such as ‘adequate’, ‘appropriate’ and ‘decent’ caused difficulties for participants. This was highlighted by participants’ contrasting opinions on the elements that constituted the item in question. It is recommended where possible to avoid the use of such adjectives.

Finally, it is clear that participants’ judgments about the items and activities which constitute the necessities of life are conditional upon the non-household and non-monetary resources (including public services and collective provision) assumed to be available to households. This is partly an issue of the substitutability of items and the information available to participants in making judgments of this type discussed above. However, more fundamentally this also highlights the importance of considering wider forms of social exclusion alongside an examination of the extent to which low income undermines people’s capacity to fully participate in society. It is therefore important to examine the range of reasons offered by survey respondents lacking deprivation items which extend beyond issues of affordability and the prioritization of household spending to encompass also wider barriers to effective participation, including those relating to poor health and disability, lack of availability, social isolation, and discrimination.

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APPENDIX 1: Comments and recommendations on specific indicators

1. Accommodation

ITEM (See note)	COMMENTS	RECOMMENDATION
<u><i>A damp free home</i></u>	This item was universally agreed to be a necessity and basic standard that all accommodation should meet.	It is recommended that this item is included without changes.
<u><i>Heating to warm living areas of the home</i></u>	This item was universally viewed as a necessity. With rising energy prices, energy efficiency and insulation were important considerations in participants thinking since poorly insulated homes are costly to heat. Participants suggested a number of related items, incl 'loft insulation', 'double glazing', 'adequate insulation', etc.	It is recommended that this item is included without changes. Alternative items focusing on energy efficiency could be considered, such as 'a draft free home' or 'an adequately insulated and ventilated home'. It is recommended that a new item be included 'an adequately insulated and ventilated home'
Draught free windows	The item was widely viewed as a necessary. Participants drew on their experience of living in poorly glazed homes and the associated additional heating costs.	
Adequate ventilation and insulation	The item was viewed as essential in maintaining thermal comfort. Participants drew on their experience of living in poorly insulated homes and the associated costs (incl health costs)	
Adequate natural light	Some participants felt that adequate natural light as a feature of basic accommodation was a necessity. Participants suggested the importance of this item for well being and the enjoyment of their living environment.	It is recommended that new item be included 'good levels of natural light'.
<u><i>Money to keep home in decent state of decoration</i></u>	This item provoked considerable discussion with regard to how the item should be understood esp what 'decent' decoration entails (i.e. cognition problems). Some participants felt this could be interpreted as being able to follow the latest consumerist trends in household furnishings which did not qualify as a necessity. Others suggested 'a decent state of <i>repair</i> ' (rather than decoration). This rephrasing seemed to address participants' concerns incl the need to ensure the home is hazard free.	It is recommended that this item be included subject to rewording 'Money to keep home in a decent state of repair and decoration'.
Smoke/carbon monoxide alarm	Participants universally viewed both a smoke detector and carbon monoxide alarm as being a necessity. Again, this is underpinned by a broader concern with maintaining a safe living environment.	It is recommended that a new item be included: 'a smoke detector and carbon monoxide alarm'.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

ITEM	COMMENTS	RECOMMENDATION
Separate bedrooms for all adults and for parents/children	All participants felt that separate bedrooms for adults was a necessity where needed, and that parents should not have to share a bedroom with their children.	It is recommended that a new item be included: 'Separate bedrooms for adults'
<i>Separate bedrooms for boys and girls aged over 10</i>	This item was widely viewed as a necessity for children after the age of around 10 years old for reasons of privacy and space.	It is recommended that this item is included without changes.
Bath or shower facilities	Some participants suggested bath and/or shower facilities within the home as a necessity and this was universally agreed. For many this was a 'taken for granted' item in contemporary society.	This item was widely viewed as a necessity and could be included. However, it may not be a sensitive measure and was not salient in participant accounts.
Enough space for all household members	Participants referred to the need for individuals to have a space that they could enjoy away from other members of the household. This was viewed as important in terms of privacy, but also for personal development, such as a space to read, listen to music or to do homework.	It is recommended that a new item be included: 'Enough space or privacy to read, write or listen to music'. This wording was tested in Phase 2. It should be noted that these groups considered this to be a desirable item, therefore this may be a useful threshold item.
A communal area for all household members	Participants emphasised the importance of a shared social space in maintaining normal social and family relationships. Participants also referred to lifestyle changes assoc with more informal living patterns which make this item essential.	It is recommended that a new item be included: 'A living room for all household members to share'.
Sole use of household facilities	There was widespread agreement that households should not have to share household facilities. Participants felt that sole use of facilities, such as a kitchen and bathroom, are necessary to ensure privacy and well being. Some participants noted that for some groups such as university students, communal living may be seen as a desirable choice.	It is recommended that this item be re-worded: 'Sole use of household facilities including kitchen and bathroom'.
<i>Insurance of home contents</i> (PSE99: '~contents of dwelling')	This item was widely agreed by participants as a means of safeguarding against unpredictable risks. Where proposed, buildings insurance was also seen as important for home-owning households. Some participants noted the increased risk of flooding as a further hazard that households should be able to insure against.	It is recommended that this item is included subject to revised wording: 'insurance of home contents'.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

2. Diet, clothing and footwear

ITEM	COMMENT	RECOMMENDATION
<u>Two meals a day for adults</u>	Diet related items provoked much discussion about how a 'meal' is understood (main meal, snack, etc) (i.e. poss cognition issue), and how this related to changing lifestyles (less regular meals, snacking, eating out etc). Participants perceptions of an acceptable minimum also varied with some participants suggesting 'three meals a day', and others proposing an adequate and/or balanced diet as an alternative.	These items make assumptions about the desirability of specific dietary regimes which were not always shared by participants. Participants' definitions of a 'meal' also varied widely. Two main meals could be an alternative. Another alternative could be a new item 'an adequate balanced diet'. However, any changes may introduce other <i>more</i> substantial problems of interpretation and could conflict with other indicators. It is therefore recommended that these items are included without changes.
<u>Meat, fish or veggie equivalent daily</u>	Whilst there was widespread consensus on the importance of this item the frequency was questioned with some participants suggesting 'every other day' was adequate. Others thought that an adequate and/or balanced diet would be a better.	
<u>Fresh fruit and veg. on a daily basis</u>	There was universal agreement amongst participants that this item is a necessity. Some participants proposed amending the frequency to 'at least daily'.	
An adequate balanced diet (including meat, fish, vegetables and carbs)	Some participants felt that diet items were too specific and 'an adequate and/or balanced diet' (or similar) would be preferable. Some participants suggested further explanation in brackets - 'including meat, fish, vegetables and carbohydrates'.	It is recommended that this new item is not considered for inclusion (see above).
Non prescription medicines	Some explanation on the definition of this item was given by interviewers referring to over-the-counter medications (analgesics etc). Participants then easily reached a consensus that this item is a necessity.	It is recommended that a new item be included: 'non-prescription medicines such as flu remedies, ointments, drops or painkillers'.
<u>Warm waterproof coat</u>	There was universal agreement amongst participants that this item is a necessity.	It is recommended that this item is included without changes.
<u>Two pairs of all weather shoes</u>	This item was widely agreed as a necessity. However, some explanation was required suggesting possible cognition problems with regard to what was meant by 'all weather'.	It is recommended that this item is included subject to changes in item wording: 'shoes for both winter and summer use'.
Adequate clothing and footwear for all seasons	Some participants suggested a change to 'adequate footwear'. Others suggested clothing and footwear items be combined in one item 'adequate clothing and footwear for all seasons'. However, interpretations of what constitute 'adequate' varied so widely that generic questions of this type are likely to be of limited use.	It is recommended that this new item is not considered for inclusion.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

ITEM	COMMENTS	RECOMMENDATION
<i><u>New, not second hand, clothes</u></i>	Some participants noted changes in the public acceptability of second-hand clothes esp. charity shops bargains targeted by middle class customers. Others noted that new clothing may now be cheaper than second-hand clothing. Some participants suggested the item should be amendments including "some new not second-hand clothes".	It is recommended that this item is included subject to changes in item wording: 'some new not second-hand clothes'.
<u>An outfit for special occasions</u>	Whilst there was general agreement this item might be a useful threshold indicator as viewed were quite mixed. Participants emphasised the importance of social expectations and roles as well as the stigma of being single out or excluded.	It is recommended that this item is included subject to changes in item wording: 'an outfit for special occasions such as a family wedding or job interview'. NB) Phase 2 groups considered this to be a desirable item, so it may be a useful threshold item.
Three complete outfits for every household member	This item was widely suggested but consensus was difficult to establish partly for definitional reasons relating to the term 'outfit' (which was interpreted as meaning matching clothing by some participants).	It is recommended that a new item be included: 'three complete sets of clothing for every household member'.
Clothes in good/clean condition	Participants thought that going into detail on separate clothing items was unproductive and a general descriptor of clothing quality would be preferable. Participants suggestions included 'clothes in good condition', 'adequate clothing and footwear for all seasons', 'clean clothing' and 'appropriate clothing for season in good condition'.	It is recommended that further consideration be given to this new item subject to revised wording: 'appropriate clothing for all seasons in good condition'.
Adequate nightwear	Where discussed there was general agreement on this item. Discussions focused on cognition problems in interpreting 'adequate' and also whether this referred only to clothing specifically designed for this purpose. This item might be important if a hospital stay is needed, or for children attending sleepovers.	It is recommended that this new item be included subject to changes in item wording: 'pyjamas or night dress'.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

3. Household items

ITEM	COMMENTS	RECOMMENDATION
<i>Mobile phone</i>	There was widespread agreement that access to a phone at home was a necessity. For many, this meant either a mobile or landline. However, some groups and participants also felt that in addition to a landline, all adults should be able to have a mobile phone in the UK today to maintain social relationships, meet social obligations (incl work), and to keep themselves and others safe. Others noted that a mobile phone is in many cases also cheaper than a landline.	It is recommended that two new items be considered: 'access to a phone (incl mobile) at home' and 'a mobile phone'. Participant decisions about whether a landline and mobile phone are necessities were sometimes inter-related. This suggests a need for some modification of existing items.
<u>Access to internet at home</u>	Internet access was widely identified as a necessity in the UK today in a variety of contexts (e.g. seeking work, education, maintaining social networks, accessing information and services). Internet access for families with children was identified as especially important, and agreement on this item for adult-only households was less pronounced. Some participants noted that internet access via public libraries, etc might be an alternative but accessibility issues (and assoc indirect costs) were decisive here. Some participants felt that 'high-speed internet access' was important. However, the consensus was that basic access today usually in practice meant broadband access which was considered adequate.	It is recommended that this item is included without changes. This item suggesting it may be a 'good' (sensitive) threshold indicator.
<u>Microwave</u>	A microwave was suggested by some participants <i>in addition</i> to use of a standard oven/hob. The substitutability of items (cooker/microwave) is an issue here (i.e. possible decision-making problem). Additional convenience (esp for families with children), energy saving, and low cost were decisive factors in participants decisions.	It is recommended that this item is included without changes. NB) Phase 2 groups considered this to be a 'desirable' item, so it may be a useful threshold item.
<u>Fridge/freezer</u>	A fridge/freezer was suggested and quickly agreed by participants on the basis of universal agreement. No cognition or decision making issues were evident.	It is recommended that this item is included without changes.
An iron	Where discussed, an iron was suggested and quickly agreed by participants on the basis of universal agreement. No cognition or decision making issues were evident.	It is recommended that this item is not considered for inclusion. Whilst universally agreed as a necessity in one group, it was not salient in most groups' discussions suggesting that it is unlikely to be a good discriminating indicator.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

Kettle	Where discussed, kettle was suggested and quickly agreed by participants on the basis of universal agreement. No cognition or decision making issues were evident.	It is recommended that this item is excluded. Whilst universally agreed to be a necessity in one group, it was not salient in most groups' discussions suggesting that it is unlikely to be a discriminating indicator.
Hairdryer	This item was suggested by some participants and provoked some discussion focused on whether this item is essential for <i>all</i> people/households (gender being decisive here!). However, there was a consensus that households (incl the exemplar) should be able to have this item if they need it.	This item is recommended for further consideration by the research team. This item could be useful in identifying gender differences in the experience of poverty.
<u>Money to replace broken electrical goods</u>	This item was discussed some participants resulting in a clear consensus across groups. Some participants emphasised the importance of safety consideration (esp for hhlds with young children). Others suggested that given the relative costs of repair/replacement, households should be able to replace broken/unsafe items (rather than repair)	It is recommended that item is included subject to revised item wording: 'Money to replace broken or unsafe electrical goods'.
Sofa and/or easy chairs for household members	Participants emphasised the importance of a shared living space for household social interaction. Having somewhere quiet and comfortable to rest and relax was also seen as important for personal well-being	It is recommended this new item be included 'Sofa and/or easy chairs for household members'.
Dining table and chairs for all household members	Many participants emphasised the importance of a communal living space for household social interaction. Some participants observed that changing lifestyles mean that this is less relevant today for them and others. Others noted that although they may be able to afford it, not all households have sufficient space - the complementarity of items is an issue.	It is recommended that a new item is included based upon revised wording: 'A table and chairs for all household members'. NB) Phase 2 groups considered this to be a 'desirable' so this may be a useful threshold item.
<u>Money to replace worn out furniture</u>	This and related items were very widely proposed and agreed as a necessities by many participants (i.e. no decision-making problems). However, considerable discussion focused on item wording (cognition problems). Some suggested that replacement furniture should not be interpreted to mean <i>new</i> furniture but simply 'functional' or 'in a good state of repair'. Others felt that it was necessary to repair 'broken' furniture rather than simply 'worn out' furniture.	It is recommended that this item is included subject to revised item wording: 'money to replace broken or worn out furniture'.
<u>Bed, bedding, mattress for all household members</u>	This item was suggested and quickly agreed by participants in a number of groups on the basis of universal agreement. No cognition or decision making issues were evident.	It is recommended that this item is included without changes.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

Curtains/blinds	This item was suggested and quickly agreed by participants in a number of groups on the basis of universal agreement. No cognition or decision making issues were evident. Participants emphasised the importance of privacy as well as energy-efficiency savings	It is recommended that this new item be included 'Curtains and/or blinds'.
Access to an outdoor space within accommodation	This and related items were widely suggested and discussed. Participants emphasised the importance of open space within the accommodation for children to play (see children's items), and access to fresh air outside for all household members. Some participants noted that <i>availability</i> of suitable accommodation can be an issue [e.g. in London] - as a minimum households should have access to a outside balcony, terrace or small yard	It is recommended that this item be given further consideration in relation to standard of living items & soc exclusion (garden, area for children to play, parks/rec areas).
Books within the home	This item was widely agreed by participants. Participants emphasised the item's cultural, social and educational importance. Some participants emphasised that <i>second-hand</i> books were very cheap and should be within reach of all. How many books households should be able to afford depended on need.	It is recommended that this item is included subject to revised item wording: 'books (incl second-hand) within the home'.
<u>Home computer</u>	This item was suggested and discussed by participants less frequently than internet access. Where discussed participants emphasised the importance of a home PC/laptop for children's education, and its role in accessing the internet for all household members.	It is recommended that this item is included without changes. NB) Phase 2 groups considered this to be a desirable item, therefore this may be a useful threshold item.
<u>TV</u>	This item was widely agreed by participants. Participants emphasised cultural, social and educational importance. Some participants suggested a <i>digital TV</i> provoking a long (and somewhat technical) discussion and suggesting a possible cognition problem. However, 'digital TV' is likely to generate other more substantial problems of cognition.	It is recommended that this item is included without changes.
<u>Radio or music player</u>	Participants emphasised social/cultural significance and the need for (cheap) recreation and entertainment. Discussion focused on <i>quality</i> issues with alternative suggestions including a 'hi-fi', 'CD player', 'music system', etc. (i.e. possible cognition problems)	It is recommended that this item is included subject to revised item wording: 'A music system or hi-fi' NB) This revised wording was tested in Phase 2 and was generally viewed as a desirable item, so it may be a useful threshold item.
<u>DVD player</u>	This item was introduced in phase 2, participants did not consider this item to be a necessity, although participants did note that these devices could be purchased at relatively low cost. For some participants a DVD player provided 'cheap' entertainment.	It is recommended that this item is included. NB) Phase 2 groups considered this to be 'desirable', so it may be a useful threshold item.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

4. Social and family life

ITEM	COMMENTS	RECOMMENDATION
<u>Holiday away from home once a year, not with relatives</u>	This item was widely agreed as a necessity. Some participants queried whether this item should specify domestic or overseas holidays. Others found the sub-clause 'not with relatives' confusing (i.e. poss cognition issue).	It is recommended that the item is included subject to revised wording 'holiday away from home once a year'.
<u>Visits to friends or family</u>	This item was widely agreed as a necessity in promoting and sustaining social relationships.	It is recommended that this item is included without changes.
<u>A car</u>	This item was strongly contested within groups. The availability of affordable (and suitable) local transport was a decisive factor here. A car was widely viewed as a necessity in areas lacking good public transport (incl rural areas) (i.e. poss substitutability problem), as well as for all families with children. Adequate access to suitable transport was viewed as vital in accessing jobs and services, and in ensuring personal autonomy.	It is recommended that this item is included without changes.
<u>Local bus & rail fares</u>	This item was widely agreed as a necessity.	It is recommended that this item is included without changes.
Money for local sporting activities or classes	This item was widely viewed as a necessity in maintain good health and well-being. Many participants distinguished between public and private facilities, the latter often being considered a luxury. Others participants considered 'leisure' in broader terms to incorporate evening classes and/or sporting activities, including as a spectator. Others noted that participation also depends upon <i>availability</i> issues (i.e. poss definitional issue).	It is recommended that consideration be given to a new item 'money to take part in local sports activities or classes'. Separate additional items 'money to attend evening or adult education classes' and 'money to attend sporting events' could be considered.
<u>Money to celebrate special occasions</u>	This item was widely agreed as a necessity. Participants generally discussed this issue in relation to the performance of social roles as a parent or family member (present giving for children at Xmas).	It is recommended that this item is included without changes.
<u>Family or friends around for a meal</u>	This item was widely agreed as a necessity in promoting and sustaining social relationships. Some participants queried the frequency for this item (i.e. poss response problem), suggesting 'once a month' was sufficient.	It is recommended that this item is included without changes.
<u>An evening out once a fortnight</u>	Participants were equivocal about this item. For some older participants, it was less applicable due to safety concerns after dark. In the main, discussion focused on <i>frequency</i> issues (i.e. poss response problem). Some participants suggested that this should be extended to 'once a month'.	It is recommended that this item is included without changes.
Theatre, concert, museum, cinema visits	This item was widely agreed as a necessity in order to take part in 'normal' social activities, as well as for personal development. Participants disagreed on <i>which</i> activities should be included given different costs. Others suggested an estimate of <i>frequency</i> is needed (monthly or quarterly)	It is recommended that this new item is included subject to revised item wording: 'a trip to a theatre, cinema, museum or exhibition once a month'.

5. Financial issues

ITEM	COMMENTS	RECOMMENDATION
<u>Paying rent/mortgage and household bills without getting into debt</u>	Where discussed there was widespread support for the inclusion of this item. Participants believed the accumulation of debt to significantly compromise individual autonomy and choices.	It is recommended that this item is included without changes.
<i>Small sum of money to spend on self weekly</i>	This item received a mixed response with some participants interpreting this item as being by definition 'non-essential' (i.e. poss definitional issue). However, for most participants this item was seen as essential for the personal autonomy of individual household members. Some participants suggested the frequency of the item could be amended to 'once a month' to reflect the reality of household budgeting.	It is recommended that this item is included subject to changes in item wording: 'Small sum to spend on self monthly' NB) Phase 2 groups considered this to be 'desirable' so it may be a useful threshold item.
Life insurance for mortgage-holders	Where discussed this item was widely supported. Participants suggested that such insurance policies served to protect households against the decline in income experienced following bereavement.	It is recommended that this item be excluded. This item was not salient in most groups' discussions suggesting that it is unlikely to be a good discriminating indicator.
Regular payments into a private or occupational pension plan	Where discussed this item was widely supported. Participants suggested that such pension plans had become increasingly significant as the value of state pensions decline. Therefore, the opportunity to set aside funds for retirement broadens the choices individuals have in later life.	It is recommended that a new item be included: 'regular payments into a private or occupational pension plan'.
<u>Regular savings for rainy days</u>	Where discussed this item was widely supported. Participants believed the opportunity to save as an insurance against possible future risks should be afforded to all members of society.	It is recommended that this item is included without changes.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

6. Children's items

ITEM	COMMENTS	RECOMMENDATION
<u>Three meals a day for children</u>	This item was viewed as less problematic than its adult equivalent, most groups easily reaching a consensus. Some participants suggested that "minimum" be added.	See adult items.
<u>Meat, fish or veggie equivalent daily for children</u>	Some participants suggested that for children this should be amended to "at least twice daily".	
<u>Fresh fruit or vegetables at least daily</u>	This was debated in conjunction with the adult item above with the vast majority of participants easily agreeing it to be a necessity.	
Milk daily	Debate focused on the availability of milk in children's diets (free school milk) and its importance.	It is recommended that this item be excluded. This item is clearly viewed as a necessity and could be included on this basis. However, this may not be a sensitive measure and was generally not salient in participant discussions.
<u>New, properly fitted shoes for children</u>	Groups easily reached a consensus that this item is a necessity.	It is recommended that this item is included without changes.
<u>Some new, not second-hand clothes for children</u>	As with the adult item above this provoked much debate. Participants discussion distinguished between <i>handed down</i> clothing (from siblings etc) and <i>second-hand</i> clothing (i.e. poss cognition issue). The former was viewed as acceptable, though some participants noted that cost comparisons sometimes mean second-hand is not always cheaper (i.e. poss definitional issue). However, for most participants the importance of peer group acceptance meant that children should have at least some new clothes.	It is recommended that this item is included without changes.
School uniform for children	This item was suggested by participants and where discussed there was a clear consensus. Participant responses emphasised social expectations and desirability.	It is recommended that this item is included without changes. A further new item 'suitable sports kit for school use' should be considered further.
<u>A garden for children to play in</u>	Most participants felt that this was probably a desirable item, rather than a necessity given accessibility issues (children living in inner city areas). However, it was widely felt that all children should have access to a safe outside area to play close to home' (below).	It is recommended that this item be included without changes. NB) Phase 2 groups considered this to be 'desirable', so it could be a 'good' (discriminating) indicator.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

ITEM	COMMENTS	RECOMMENDATION
Access to a safe outside area to play close to home	Item proposed by P1 groups (see above). Item confirmed as necessity in P2 groups.	It is recommended that this new item is included.
<i>Books for children of their own</i>	A few participants suggested that access to a library is sufficient, though others questioned their accessibility and practicality for young children. A general consensus was reached that all children should have access to at least some books which are their own.	It is recommended that this item is included without changes.
<i>Toys (e.g. dolls, teddies)</i>	A general consensus was easily reached across groups that this item is a necessity.	It is recommended that this item is included without changes.
Toys for personal development and education	Some participants felt that it is important that children should be able to have toys that are educational or stimulate development. However, participants were not always clear on what this meant (i.e. poss cognition issue) and concrete examples would help here. A number of specific suggestions were 'Educational toys' and 'Toys for personal development'.	It is recommended that further consideration is given to this new item subject to suggestions on suitable examples.
<i>Leisure equipment for children</i>	This item provoked significant definitional queries (i.e cognition problems) incl what is meant by 'equipment' and the scope of 'leisure' (incl sports, recreation, etc). Some participants suggested inserting the term 'basic'. It was widely agreed that concrete examples should be included (e.g. 'rugby ball', 'skipping rope', 'bike' etc).	It is recommended that this item is included subject to revised item wording 'leisure and sports equipment for children such as a bicycle, ballet shoes or a guitar'
Sports equipment for children	See above item.	See above.
<u>Hobby or leisure activity</u>	Participants suggested and agreed that hobbies or leisure activities were important for children's personal development. Where discussed, participants quickly reached agreement on this item	It is recommended that this item is included without changes.
Money for children's clubs, societies and related activities	Participants suggested and agreed that money for children social and leisure activities was important for their personal development. Where discussed, participants quickly reached agreement on this item	It is recommended that a new item is included 'money for children's clubs and activities such as guides or football training'.
Money for after-school clubs	Some participants suggested and agreed that money for after-school clubs was important for children's personal development. Where proposed participants quickly reached agreement on this item. Nevertheless, it is possible that cognitions problems exist with some participants interpreting this broadly to include out-of-school recreational activities.	It is recommended that this new item is not included.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

ITEM	COMMENTS	RECOMMENDATION
<i>School trips at least once a term</i>	This item provoked considerable debate focusing on the cost of the trip and whether the trip's purposes were educational. Participants also discussed the frequency of trips (i.e. poss response problems) with the term 'at least' suggested. Other participants suggested 'reasonable cost' and 'educational (school trips)'.	It is recommended that this new item is included 'money to pay for school trips at least once a term'.
Family outings	This item was widely agreed as a necessity in order to take part in 'normal' social activities today. Participants queried the nature (and cost) of activities involved (i.e. poss cognition problem), as well as their <i>frequency</i> . Some examples may be helpful here. Some participants may interpret this item to apply to <i>all</i> households not only those with children (i.e. poss cognition issue).	It is recommended that this item is included subject to revised item wording 'Family outings at least once a month, for example, to the seaside or zoo'. An additional new item [e.g.] 'a special day out once a month' could be considered for adults.
<i>Friends round for tea/snack fortnightly</i>	This item was universally considered a necessity but as with the previous item, the frequency provoked debate (i.e. poss response problems). 'Fortnightly' was thought outdated by some participants suggesting 'occasionally'. However, 'occasionally' is likely to create additional, more substantial cognition problems.	It is recommended that this item is included without changes.
Treats for children on special occasions	This item was suggested by participants though the meaning of 'treats' varied between groups (i.e. poss cognition problems), to include food, sweets, etc as well as trips or cultural events. This item could also be interpreted to include treats on birthdays, Xmas, etc.	It is recommended that this item is not considered for inclusion without further clarification of question meaning.
<i>A mobile phone for older children</i>	This item provoked much debate with opinion remaining divided in some groups. Many participants viewed this item as a necessity for older children for reasons of personal safety and as a social networking tool. Views varied on the age that children should own a mobile phone with most participants in the range 10 to 14.	It is recommended that this item is included subject to revised item wording 'a mobile phone for children aged 11 and over'.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

7. Luxury items

ITEM	COMMENTS	RECOMMENDATION
<i>Membership of a gym or sports club</i>	Participants easily reached agreement that membership of a gym or sports club is a luxury. There was some discussion of the importance of participation in physical/sporting activities, esp in view of anti-obesity health messages, but it was felt that this could be achieved by participation in other activities (e.g. local leisure classes).	It is recommended that this item is given consideration. This might be a 'good' (i.e. discriminating) indicator of living standards at the upper end of the distribution.
<i>An iPod or MP3 Player</i>	Participants noted that purchase costs differ widely between a top of the range iPod and a basic MP3 player, which can be purchased at relatively low cost. When asked to come to a decision, however, the majority of participants defined this item as a luxury.	In view of the problems with cost differentiation it is recommended that consideration is given to a guide valuation 'An iPod or MP3 player costing more than £75'.
<i>A school trip abroad once a year</i>	Discussion of this item included debate on educational value, cost ec. The potential for social exclusion if children/young people are unable to participate in such a trip was recognised by participants, however a majority regarded this item as a luxury.	It is recommended that this item be considered in conjunction with the item "A school trip at least once a term" (see Phase 1). It might be a good (discriminating) indicator.
<u>A dishwasher</u>	This item was not discussed by Phase 2 groups as the majority of participants in Phase 1 groups had viewed it as a luxury item rather than a necessity.	It is recommended that this item is given consideration. This might be a 'good' (i.e. discriminating) indicator of living standards at the upper end of the distribution.

NOTE: *italicised items*: item prompted by interviewers; underlined items: existing 99PSE item

Group Findings

APPENDIX 2: Sample Profile

Table A1: Selected respondent characteristics

Age group	N	Col%
lt 30	20	18
30-44	36	32
44-59	23	20
60+	22	19
TOTAL	101	89

Sex	N	Col%
female	61	54
male	53	46
TOTAL	114	100

Household type	N	Col%
couple with dep children	40	35
couple no dep children	13	11
pensioner hhld	18	16
single parent	23	20
other	13	11
single non-pensioner	7	6
TOTAL	114	100

month	N	Col%
less than £750	17	15
£750-1,500	45	40
£1,500-2,500	25	22
more than £2,500	27	24
TOTAL	114	100

Housing tenure	N	%
owner occupier	57	50
social rental (LA/HA)	18	16
private rental	36	32
other	3	3
TOTAL	114	100

Dwelling type	N	Col%
detached house	23	20
semi-detached house	37	33
terraced house	33	29
flat	18	16
other	3	0
TOTAL	114	97

Hhld income per	N	Col%
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Table A2: Group composition by selected respondent characteristics (*column percentages*)

INCOME	BRS1	BRS2	BRS3	CDF1	CDF2	CDF3	GLS1	GLS2	LDN1	LDN2	LDN3	NI1	NI2	NI3	ALL
Less than £750	11	38	..	11	..	67	11	38	..	11	22	10	15
£750 to £1,500	25	33	56	63	22	11	33	17	33	63	13	56	67	50	40
£1,500 to £2,500	38	22	22	..	33	44	..	17	22	..	25	33	11	20	22
More than £2,500	38	44	11	..	44	33	67	..	33	..	63	20	24
TENURE															
Owner occupier	63	67	89	75	89	33	33	17	22	25	50	11	33	70	50
Social renter (LA/HA)	0	22	0	13	0	22	33	33	33	63	0	11	0	10	16
Private renter	25	0	11	13	11	44	0	50	44	13	50	78	67	20	32
Other	13	11	0	0	0	0	33	0	0	0	0	0	0	0	3
DWELLING TYPE															
Detached	50	33	78	13	56	0	0	0	0	13	0	0	22	0	20
Semi-detached	13	22	0	50	0	67	33	33	33	0	50	44	44	60	33
Terraced	13	44	11	25	33	33	0	33	11	38	13	56	33	40	29
Flat	13	0	0	13	11	0	67	33	56	38	38	0	0	0	16
Other	13	0	11	0	0	0	0	0	0	13	0	0	0	0	3
AGE															
Less than 30	13	33	0	0	22	60	67	50	11	33	0	33	13	0	20
30-44	25	22	0	0	56	0	33	50	44	17	71	67	38	63	36
45-59	50	11	0	0	22	40	0	0	44	17	29	0	50	38	23
60+	13	33	100	100	0	0	0	0	0	33	0	0	0	0	22
SEX															
Female	50	22	67	63	56	89	0	67	44	38	38	44	78	60	54
Male	50	78	33	38	44	11	100	33	56	63	63	56	22	40	47
N	8	9	9	8	9	9	3	6	9	8	8	9	9	10	114