

Poverty and Social Exclusion in the UK: Ten years into the new Millennium

Summary

The primary purpose of this bid is to advance the 'state of the art' of the theory and practice of poverty and social exclusion measurement. The research team is arguably the most experienced in poverty measurement methodology ever assembled in the UK and the team members have a proven track record of making significant advances in our understanding of poverty and social exclusion.

In order to improve current measurement methodologies, funding is sought to develop and repeat the Poverty and Social Exclusion Survey (PSE). This survey, funded in 1998-99 by the Joseph Rowntree Foundation and covering 1500 households, was the most comprehensive survey of poverty ever conducted in Britain and it has had a major impact on the measurement of poverty and development of anti-poverty strategies, at national, European and global levels. It was the third wave of a series of nationally representative surveys looking at 'Breadline Britain' that were unique in using a consensual measure of minimum necessary living standards and direct measures of material and social deprivation rather than solely relying on proxy income data. A similar PSE survey was carried out in Northern Ireland (PSENI) in 2002-03.

The 1999 PSE and 2002-03 PSENI surveys specifically developed direct indicators of social exclusion as well as material deprivation. This research will build on these previous methodological innovations in the light of current policy concerns as well as subsequent theoretical developments in the measurement of poverty and social exclusion, notably the Bristol Social Exclusion Matrix (B-SEM). The 1999 survey was carried out by the Office for National Statistics as a follow up to a sub-sample of the General Household Survey (GHS). The intention is to repeat this process but as a follow-up to the 2010/11 Family Resources Survey (FRS) in both Britain and Northern Ireland. Permission to undertake these follow-up surveys has been agreed in principle by the Department for Work and Pensions and the Department for Social Development (in Northern Ireland).

The primary purpose of this research will be to advance scientific knowledge and understanding of how best to conceptualise and measure poverty and social exclusion. UK social scientists are the acknowledged world leaders in the field of poverty measurement and this new research will help to maintain their pre-eminence in this area based on a 'state of the art' survey. Furthermore, this research will also produce information of immediate and direct interest to policy makers, academics and the general public. In addition, it will provide a rigorous and detailed independent assessment on progress towards the UK Government's target of reducing child poverty by half between 1998/99 and 2010.

Objectives

Development of the PSE methodology would enable us to achieve three primary aims:

1 To improve the measurement of poverty, deprivation, social exclusion and standard of living .
The objectives will include:

- To develop new combined income/deprivation poverty measures for adult groups
- To facilitate the re-basing of the data on necessities that is incorporated into the measurement of child poverty in the UK (i.e. the combined low income and material deprivation child poverty measure)
- To construct a standard of living index for the UK

- To test the reliability and validity of the material deprivation module currently being incorporated into European Union Survey of Income and Living Conditions (EU-SILC) and the Laeken indicators

2. To assess change in the nature and extent of poverty and social exclusion over the past ten years.

The objectives will include:

- To collect and analyse new cross-sectional data on poverty and social exclusion thereby extending the existing series of Poverty and Social Exclusion surveys
- To collect and analyse qualitative evidence on how low living standards and social exclusion shape the lifestyles of families, households and individuals
- To provide an independent check on progress in reducing child poverty in 2010
- In Northern Ireland, to assess progress on the extent to which poverty and social exclusion vary across the nine dimensions of equality specified in Section 75 of the Northern Ireland Act 1998, to investigate further the legacies of the Troubles and to ascertain the role of family, institutionally and culturally, in coping with poverty and social exclusion

3. To conduct policy-relevant analyses of outcomes and causal relationships from a comparative perspective. The objectives will include:

- To explore causal relationships between different dimensions of poverty and social exclusion
- To use the new data in conjunction with the FRS and the Work and Pensions Longitudinal Study (WPLS) to undertake longitudinal analysis of patterns of poverty, exclusion, employment and benefit receipt
- To provide analyses of poverty and social exclusion relevant to the devolved governments within the UK
- To analyse comparatively the use of poverty and social exclusion indicators in national and regional anti-poverty strategies, including, comprehensively measuring the living standards of those people identified as poor in current official measures

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Introduction

The primary purpose of this bid 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, funding is sought to develop and repeat the Poverty and Social Exclusion Survey (PSE) as a follow-up to the 2010/11 Family Resources Survey (FRS) in both Britain and Northern Ireland. There are three main aims (see Objectives document for further details)

1. To improve the measurement of poverty, deprivation, social exclusion and standard of living
2. To assess change in the nature and extent of poverty and social exclusion over the past ten years.
3. To conduct policy-relevant analyses of outcomes and causal relationships from a comparative perspective.

Background and Rationale

Every decade or so since the late 1960s, UK social scientists have attempted to carry out an independent poverty survey to test out new ideas and incorporate current state of the art methods into UK poverty research. Thus, the 1968-69 *Poverty in the UK* survey (Peter Townsend and colleagues), the 1983 *Poor Britain* and 1990 *Breadline Britain* surveys (Joanna Mack, Stewart Lansley and colleagues) and the 1999 *Poverty and Social Exclusion Survey* (Jonathan Bradshaw and colleagues) and its 2002 counterpart in Northern Ireland (Paddy Hillyard and colleagues), introduced new methods, ideas and techniques about poverty measurement and helped to keep UK academic research at the forefront of poverty measurement methodology.

These academic surveys had a considerable policy and methodological impact in the UK, Europe and other countries, even though this was not their primary purpose. For example, the European Union adopted a relative definition of poverty that had been developed by the 1968-69 *Poverty in the UK* survey. Following the United Nations Summit on Social Development (1995), the Irish Government developed an anti-poverty strategy which included a measure of ‘consistent’ poverty which combined low relative income with the lack of basic necessities. More recently, the UK Government has adopted a new combined low income and material deprivation child poverty indicator developed from the 1999 PSE survey. Finally, the European Union is incorporating a deprivation module in the 2009 EU-SILC survey as a forerunner to producing an EU-wide deprivation index measure for policy purposes.

Poverty and social exclusion remain key policy challenges for current and future governments in the UK, the European Union and the global community. In 2000, the eradication of poverty and social exclusion became a central goal of the Lisbon Agenda, with each member state required to produce a biennial plan, the National Action Plan for Social Inclusion. At this time, the UK had among the highest levels of inequality, poverty (and especially child poverty) in the EU. In 2005, the re-launch of the Lisbon Process, targeted at economic and employment growth, was accompanied by a revision of the social inclusion strategy, aiming to introduce specific targets into the planning process to improve its effectiveness – necessary because of disappointing progress in reducing poverty and exclusion. In the UK, tackling poverty and social exclusion were part of the agenda of the incoming Labour Government in 1997, with a dedicated Social Exclusion Unit set up and an annual audit of indicators of poverty and social exclusion, *Opportunity for All*, created later in 1999. Specific targets were set by the Blair Government for the elimination of child poverty, including halving it by 2010 and eradicating it altogether ‘within a generation’.

Poverty amid affluence is a long-standing problem in Britain that has been addressed by poverty researchers from Fredrick Morton Eden, Charles Booth and Seebohm Rowntree onwards. Even when levels of inequality were at their lowest in the UK, in 1976, poverty remained a problem. Townsend (1979) reported on the results of a UK survey carried out in the late 1960s. A key finding of this survey was that there were levels of income below which consumption and participation fell well below what might be seen as normal or acceptable in an increasingly affluent society.

In 1983, the first 'Breadline Britain' survey, *Poor Britain*, was conducted (Mack and Lansley 1985). While Townsend had offered a list of necessities for the purpose of assessing material and social deprivation, Mack and Lansley adopted a consensual approach. Rather than necessities being determined in a top-down manner, by academics or officials, they were assessed by public opinion about the minimum necessary standard of living; and the question of whether their non-possession was voluntary or enforced was also built into the study. A second survey, *Breadline Britain*, was undertaken in 1990 (Gordon and Pantazis 1997), funded by the Joseph Rowntree Foundation and London Weekend Television.

The fourth dedicated poverty survey, *Poverty and Social Exclusion in Britain: the Millennium Survey* (PSE) (Gordon et al. 2000, Pantazis et al. 2006) was conducted in 1999. Its purpose was both to follow up the 1983 and 1990 surveys and to provide a base-line for the new Millennium. At the end of 1999, around a quarter of the population (about 14 million people) were living in poverty. Rather than being based on simple income relativities, this reflected definable material deprivation, such as 9 million people without adequate housing and a third of British children lacking at least one necessity of life. Social deprivation was also reflected by the 10 million adults and one million children too poor to participate in common social activities such as visiting friends and family, having celebrations on special occasions, or attending weddings and funerals.

In 2002-03, a team from the University of Ulster and Queen's University Belfast carried out a large scale Poverty and Social Exclusion project in Northern Ireland based upon a similar methodology to that used in the 1999 PSE. It was funded by the Office of First Minister and Deputy First Minister, the Department of Finance and Personnel with support from the Treasury's evidence-based policy fund. It found that nearly 30% of all households (about 185,000 people) in Northern Ireland were living in poverty and that there was wide variation in poverty among the nine section 75 dimensions (Hillyard et.al. 2003). A major innovation of the study was to draw upon the work carried out by the Ministry of Social Development in New Zealand to construct a Living Standard Index as well as the consensual measure of poverty. This involved building upon the New Zealand Economic Living Standard Index (ELSI) (Krishnan, Jensen and Ballantyne, 2002, Jensen et. al., 2002 and Jensen et. al. 2006) to construct a Northern Ireland Living Standard Index (NILSI) (Hillyard, Patsios and Scullion, 2007). The two indices are conceptually comparable and showed that Northern Ireland is the more divided society, where the distribution of living standards is much more polarised. Another innovation of the Northern Ireland PSE survey was the inclusion of a small module covering direct experience of violence and conflict-related events. This contributed to public discussion of the legacies of the 'Troubles' and led to an analysis of the relationship between poverty and conflict internationally (Hillyard, Rolston and Tomlinson, 2005).

There is some recent evidence from the UK Households Below Average Income data of a slight drop in relative income poverty levels. Child poverty has fallen, although estimates suggest that the target for 2010 will not be met without significant additional action. We do not have the directly comparable data to assess whether the legacy of the Blair era has, in fact, been a marked drop in levels of material and deprivation or whether, despite overt commitment at both national

and EU level, poverty remains at the high levels of the 1990s. A repeat of an updated and improved PSE survey would enable such an assessment to take place. Fieldwork in 2010, which would represent an eleven year gap since the last survey (the other surveys were conducted at shorter intervals) seems timely, not least because 2010 has been declared the European Year for Combating Poverty and Social Exclusion.

In the ten years since the PSE questionnaire was developed, there have been many theoretical, methodological and substantive developments – some of which are the direct result of the earlier survey work. The importance of direct measures of material deprivation is now more widely accepted: elements of these have been incorporated into the new official UK measurement of child poverty; into the Families and Children Survey (FACS); into EU measurements, especially in the EU(SILC) and into UN definitions and measurement of poverty (Rio Group, 2006). Nevertheless, these work with a much narrower range of material necessities than does the Breadline Britain/PSE series. In 2008, a new module on material deprivation amongst pensioners will be incorporated into the Family Resources Survey and in 2009 a new module on material deprivation will be included in a redesigned General Household Survey (GHS-L) to comply with the requirements of EU legislation on the provision of data for the EU-SILC. Professor Gordon was an academic advisor to the Intergovernmental Eurostat committee which developed the new EU-SILC material deprivation module- most of the questions were derived from the 1999 PSE survey. It is likely that deprivation measures based on these new survey modules will eventually become official indicators used to target resources for combating poverty and social exclusion. Therefore, it is essential that the level of validity and reliability of these deprivation modules are assessed. A new and updated PSE survey will provide the necessary comprehensive information on the experiences of poverty and social exclusion for such an assessment.

The definition and operationalisation of social exclusion has also developed over the past decade. However, a recent Cabinet-Office funded review of available data sources on multidimensional measurement of social exclusion showed that very few UK data sources permit analysis using more than a handful of the ten dimensions of exclusion identified in the B-SEM, or Bristol Social Exclusion Matrix (Levitas et al. 2007). The Social Exclusion Task Force has commissioned secondary analysis of existing sources based on the B-SEM across the life-course, some of which have been produced by Fahmy, Gordon and Levitas, some by Bradshaw and colleagues and some by the National Centre for Social Research. However, while FACS and the English Longitudinal Study on Ageing (ELSA) provide reasonable though limited data for children and for older people respectively, Levitas and her colleagues showed that the PSE was the only survey which collected data across all, or even almost all, domains. This was particularly true for the working age population, for whom the next-best survey was the GHS. Where the more participatory - as distinct from resource-centred or employment-centred - aspects of social exclusion are concerned, the advantages of the 1999 PSE were even greater. However, the domains covered by the PSE and the questions asked, need to be re-examined and analysed in the light of developing understandings of social exclusion.

Policy Relevance

The EU-SILC material deprivation module will be used by Eurostat to select a sub-set of variables to measure both adult and child deprivation. Eurostat has amended the regulations concerning the EU-SILC to include some of these questions in the core questionnaire and they will subsequently be used to construct a new Laeken indicator of deprivation, which will be used directly for policy purposes. The UK Government has, since 2004/05, included a 20 question deprivation module in the Family Resources Survey which is used to produce a combined low income and material

deprivation child poverty measure. This measure is the key indicator for a PSA target (DWP and HM Treasury) on eradicating child poverty. The UK will therefore soon be producing two 'official' deprivation measures (an EU-SILC/Laeken and a FRS/DWP based measure) which will be similar but not identical. It will be of considerable interest to policy makers to understand how these two different 'official' measure of deprivation are related.

In Northern Ireland, the PSE study contributed to arguments for the extension of the FRS to Northern Ireland and its findings were used to inform the development of an Anti-Poverty Strategy (OFM/DFM, 2004 and 2006). The poverty and conflict work, commissioned by Combat Poverty Agency (Dublin), informed the review of EU Peace II funding. The potential benefit to future policy making is substantial.

The new PSE survey will:

- provide policy makers with information from a 'state of the art' survey on the best methods of measuring poverty and social exclusion
- provide policy makers with a comparison of how the 'current' measures of poverty and deprivation compare with a range of other measures of poverty and social exclusion
- provide a unique opportunity to show directly how the two deprivation indices (FRS and EU-SILC) compare with each other and with a broader set of deprivation measures
- provide policy makers with information on the populations perception of necessities in 2010 and how these public perceptions have changed over the previous ten years
- provide policy makers with some information on the dynamics of deprivation, employment and benefit receipt based on the deprivation questions in the FRS Material Deprivation module and the linked benefit and tax records from the Work & Pensions Longitudinal Study (WPLS)
- provide policy makers with information from a 'state of the art' survey on the effects of poverty and social exclusion on UK society in a wide range of policy relevant subject areas (e.g. health, housing, employment, services, crime, etc.)
- In Scotland, it will provide policy makers with greater understanding of the extent of poverty and social exclusion amongst those people included in the new 'Solidarity' target measure.

Research Questions

The three primary research questions this work will seek to answer are:

- 1) What are the best methods for measuring poverty, deprivation, social exclusion and standard of living?
- 2) How are the different dimensions of poverty and social exclusion related?
- 3) How has the nature and extent of poverty and social exclusion changed over the past decade?

There are, of course, a number of sub-questions included within each primary question, for example:

- 1(a) What are the best methods for measuring intra- household poverty, deprivation, social exclusion and standard of living?
- 2(a) What are the best methods for measuring poverty, deprivation, social exclusion and standard of living amongst ethnic minority groups.

Methodology

The two-stage methodology will be used in both Britain and Northern Ireland - a smaller 'attitudes' survey followed by a larger main stage survey of Poverty and Social Exclusion (i.e. the same split as with the 1999 PSE). The main survey will be a follow-up to the FRS 2009/10 survey in both Britain and Northern Ireland. DWP and NISRA have provided letters giving their 'in principle' agreement for this. This two stage methodology allows the population's perceptions of what constitute the necessities of life to be measured using random sample Omnibus surveys in both Britain and Northern Ireland. The FRS can be used as a sampling frame for the main survey that is stratified to over-sample:

- a. the 'poor' (i.e. those with both a low income and suffering from material deprivation using the FRS combined measure)
- b. ethnic minority groups
- c. respondents in Scotland
- d. respondents in Northern Ireland

The purpose of these sampling strata is to achieve a cost effective main stage poverty survey that is nationally representative for all countries in the UK and for ethnic minority groups. A FRS follow-up also constitutes a highly efficient methodology as only respondents who have been interviewed in the past and agreed to be interviewed again will be contacted. The FRS will also provide a large amount of information on non-respondents to the follow-up PSE survey which will facilitate accurate non-response re-weighting of the final data. Ideally, we would wish to also obtain a nationally representative sample for Wales, unfortunately, the lack of a Welsh booster sample in the FRS means that there are insufficient Primary Sampling Units (PSU) in Wales to draw a nationally representative sample from a single year's FRS.

Perceptions of poverty survey

In the first attitudinal perceptions of poverty survey, a random cross-section of the population will be asked which of a series of items (both material and social) they regard as essential and which are only desirable, with a separate set of items relating to children. This survey will form the basis for defining 'necessities'. This consensual approach gives wider social legitimacy to the assessment of deprivation in the main survey but, more importantly, allows the measurement of deprivation by comparison with the standards prevailing at a particular time in a particular society. It is thereby a generalisable methodology which has been shown to work in both 'rich' and 'poor' countries over the past 30 years.

One significant task will be to 'update' the items, by both adding 'new' items which have become more common since the surveys began (such as computers, internet access, mobile phones, etc.) and potentially removing 'old' items whose status as necessities has declined (as was the case in 1999 for owning a dressing-gown). It is also intended to explore potential cultural biases in the list and amend it accordingly. A second issue is that the majority of items in the original deprivation list relate to material necessities with only a minority concerning social participation. Development work on social exclusion will be utilised to expand the questions about participation.

The perceptions of poverty survey will be included as a 20 minute question module in the National Centre for Social Research (NatCen) Omnibus survey in Britain and in the Northern Ireland Statistics and Research Agency (NISRA) Omnibus survey. Both these survey organisations are partners in this bid.

The NatCen Omnibus is a random sample of adults aged 16+ in 3,050 addresses in Britain selected from the small users Postcode Address File (PAF). The NISRA Omnibus is a systematic random sample of adults (16+) in 2,200 addresses drawn from the Land and Property Services Agency list of private addresses. Interviewers can interview only at the selected addresses and must seek to persuade those randomly chosen using a Kish grid methodology, to take part in the study. This helps to avoid the biases that can arise when interviewers are given more flexibility about when and where they interview, as is the case with quota sampling. Interviews will take place in respondents' own homes using Computer-Assisted Interviewing (CAI). A boost sample of 700 addresses in 35 extra PSUs will be required in order to achieve 500 interviews in Scotland.

The total sample size will be about 1,860 interviews in Britain and 1,400 in Northern Ireland. The following table shows illustrative simple 95% confidence intervals around survey estimates of 10%, 25% and 50% for England and Wales, Northern Ireland, Scotland and Great Britain:

	England and Wales (n = 1,360)	Northern Ireland (n=1,400)	Scotland (n = 500)	Great Britain (n = 1,860)
10%	± 1.6%	± 1.6%	± 2.6%	± 1.5%
25%	± 2.3%	± 2.3%	± 3.8%	± 2.1%
50%	± 2.7%	± 2.6%	± 4.4%	± 2.4%

User testing of the questionnaire will be carried out by the respective Omnibus research teams, as well as by the NatCen Operations Department to identify both Blaise programming errors and any weaknesses in the questionnaire design. In addition, a field pilot consisting of approximately 40 interviews will be conducted as part of the questionnaire development process.

Poverty and Social Exclusion survey

The main Poverty and Social Exclusion Survey will aim to interview all adults in each household. The survey will be divided into a household questionnaire which will be answered by the Household Reference Person (HRP) and an individual questionnaire which will be answered by all adult household members (aged 16 and over). The household questionnaire will be about 50 minutes in length and interviewing of other adults in the household will take an additional 30 minutes on average (there are 1.8 adults on average in FRS households). The survey will include questions in relation to each 'necessity' as to whether the individual adult or child, or household, has the item or does the activity in question. A shuffle-card system is used for each item: 'has/does'; 'has not or does not because cannot afford'; 'has not or does not because does not want'. Questions on material necessities which affect all household members (e.g. if the household possesses a fridge, etc.) will only be answered by the HRP, whereas social deprivation questions will be answered by all household members. This improved methodology (compared with previous poverty surveys) will facilitate analyses of intra-household poverty. Further sections of the main questionnaire will explore a range of other dimensions of deprivation and social exclusion, including physical and mental health, crime and social harm, education, school exclusion, employment, access to services, social and civic participation and social networks.

This new PSE survey will be large enough to allow more substantial sub-group analyses than has been possible with previous poverty surveys. The main survey in Britain will aim for an achieved sample of 4,000 households and 6,000 individuals – with approximately 1,000 households in the 'ethnic' strata and 1,000 households in Scotland. . In Northern Ireland, the achieved sample will be

800 households and 1,250 individuals. The main survey work will be conducted by NatCen FRS team in Britain and by NISRA's Central Survey Unit in Northern Ireland. The data will be supplied in anonymised form as SPSS system files.

The FRS draws a sample of over 44,000 households in Britain and approximately 3,600 households in Northern Ireland. Response rates are typically in the region of 60% yielding an achieved sample of over 25,000 households and over 80,000 individuals. Interviews for the PSE follow-up survey will only be conducted with respondents in the 2010/11 FRS survey who have given their permission to be contacted again. In the 2007/08 FRS survey, just over 77% of household reference respondents gave their permission for such a re-contact in the British sample. If similar response and re-contact permission rates are achieved with the 2010/11 FRS, this will provide a sample of about 20,000 households (including 3,400 in Scotland and 1,700 with ethnic minority respondents) from which to draw the PSE follow-up survey addresses.

Survey development qualitative methodology

Development work will be needed both on the necessities survey and on the main questionnaire. This will be undertaken in 2010/11, with the Omnibus necessities modules run in March 2011 and the first wave of the revised PSE in Autumn 2011. Qualitative research methods, including results from twelve focus group discussion and 15 cognitive interviews, will be used to inform the survey development. This research will follow the successful methodology used during the 1999 PSE development phase. Details of the focus groups are shown in the table below.

Group discussions

	Phase 1					Phase 2
	Pensioners	Lone Parents	Couples with Children	Couples without Children	Single	Mixed
Urban	1	1	1	1	1	2
Rural	1	1	1	1	1	

Participants will be professionally recruited and will complete the following instrumentation prior to attending their group discussion:

1. a recruitment questionnaire to collect basic demographic information about the participant and their household;
2. a self-completion diary of items consumed, kept for one week;
3. a self-completion inventory of clothes, furniture and other household equipment.

The main aim of the diary and inventory will be to encourage participants to begin to consider their own living standards, so that they could negotiate in the groups on the basis of detailed knowledge. In the first phase of the research (ten groups), participants will negotiate and agree lists of items, activities and facilities which all adults and children in the UK should be able to have and should not have to go without. Once the lists are complete, the groups will be asked to consider whether all items are of equal importance in avoiding poverty or whether some are more important than others. This will be followed by a discussion of items included in the list which should not be there and items not included in the list which should be there. The first phase groups will also discuss the dimensions of time and gender in relation to poverty in general terms.

Prior to the second phase of the research (two groups), the list of socially approved necessities will be amended to include items which had emerged as strong priorities in the first phase. The second phase groups will also discuss the length of time for which households and individuals could go without each item without slipping into poverty and whether women or children were more likely to go without each individual item.

Cognitive interviewing, using the verbal probing method will be used to test and improve the main questionnaire. The aim of this work is to reduce misinterpretation and confusion created by unclear questions and thereby help reduce error in the estimates created from the survey data

The results of the Omnibus survey and of the qualitative development work will be used in the development work on the main questionnaire itself. The original PSE questionnaire is in the public domain at <http://www.bristol.ac.uk/poverty/pse/question.htm> and has been replicated in several different national contexts. Although many aspects of the questionnaire should be maintained for reasons of continuity and comparison over time, there is a need for re-assessment in light of the qualitative work in this proposal and the recently devised B-SEM (Bristol Social Exclusion Matrix) (see below under innovation).

As part of this process, we envisage a high-level workshop involving key people such as Professor Tony Atkinson and those who have been responsible for running/adapting the PSE in other

countries (Australia, Finland, Germany, Hong Kong, Ireland Japan, Mexico, New Zealand, South Africa, Sweden, Taiwan and possibly the Ukraine – see project management section).

Qualitative methodology

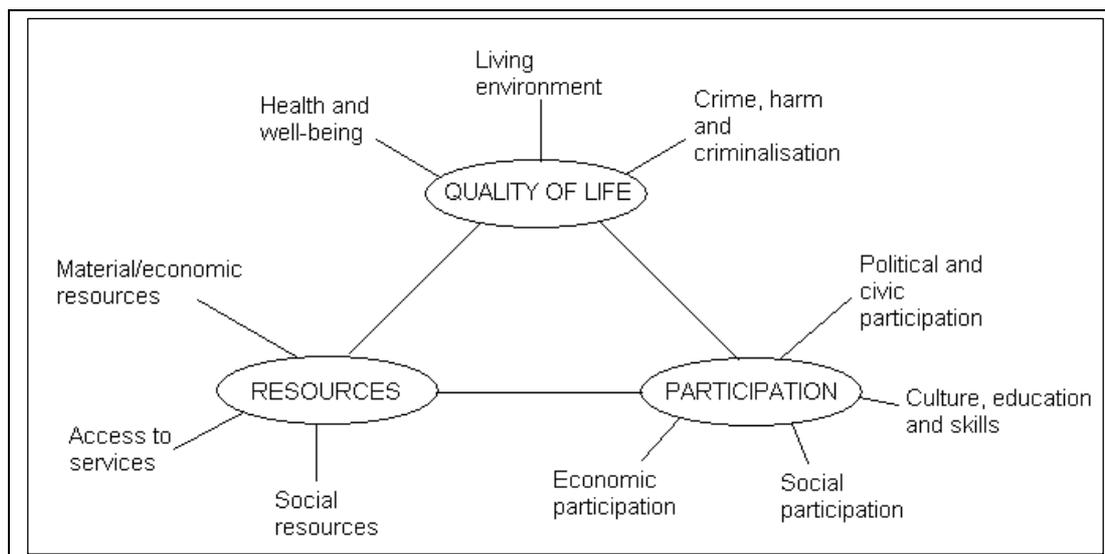
In Northern Ireland, a qualitative survey of around 100 respondents will be conducted to explore the role of family in coping with poverty. The context here is specific to the province but draws also from national and even international insights and concerns. It is well known that family has a particular resonance in Northern Ireland – the nature of the social divisions were such that the degree of reliance on family was greater in Northern Ireland than elsewhere (Daly 2004; Daly and Leonard 2002). Northern Ireland therefore presents a unique opportunity to explore the continuing role of family in the transmission of poverty and in coping with it. The proposed study will have a material focus – examining the extent to which resources are transferred among family members (both nuclear and extended) - and it will also explore family cultures and family relationships as factors affecting poverty and social exclusion. The proposed study has relevance beyond Northern Ireland and so could be regarded as a pilot for future work elsewhere. Welfare states throughout the developed world have become much more interventionist in regard to the family – they need and desire families that work. The activation turn in social policy has, among other things, put much more emphasis on the coping strategies of households and families and their capacity for self-reliance. Given this, it is vitally important to understand whether and how families are being called on to subsidise individual members and to ameliorate the consequences of state cut-backs and reform. The proposed study will therefore help to reveal the extent and limits of family solidarity.

In Britain, a qualitative survey of 72 respondents will be conducted to explore the ‘life stories’ of participants experiencing poverty, in order to understand poverty persistence and the significance of key ‘life events’ in shaping current circumstances and prospects. This work will contribute to an emerging literature in which poverty is understood as a social and symbolic relationship in which ‘the poor’ are constructed as ‘other’ and excluded from society (Lister, 2004). Drawing upon these insights and, by giving voice to the views of poor people themselves, this research will investigate not only the material/economic dimensions of poverty but also its subjective connotations such as the denial of rights, powerlessness, shame, stigma, isolation and disrespect. Semi-structured interviews will be conducted in order to provide the flexibility to explore the relational and biographical dimensions of disadvantage and the sample will be drawn from amongst the NatCen Omnibus survey respondents answering suitable screening questions and giving permission for re-contact. This will provide a more rigorous sampling frame than is usually available to qualitative researchers.

Innovation

The PSE methodology has always been innovative in crucial respects. Firstly, the use of the Omnibus survey provides a consensual rather than administrative basis for the identification of material and social necessities for both adults and children. Secondly, it pioneered the use of direct measures of material deprivation rather than their inference from proxy indicators such as income. In 1999 also, it pioneered the similar application of direct measurement techniques to the question of social exclusion, with a distinctive emphasis on exclusion from social relations and participation in common social activities. That innovation and development of best practice will continue in this survey with the use of the Bristol Social Exclusion Matrix (B-SEM). This matrix was initially constructed as a heuristic device to assess the scope for secondary analysis of data sets in terms of the interaction of factors in poverty and social exclusion. It consists of ten domains:

The Bristol Social Exclusion Matrix: Domains and Sub-domains



The B-SEM was developed in 2006 from a survey of existing social exclusion indicators from different governmental and non-governmental sources, together with an analysis of theoretical approaches to social exclusion. It was designed as a heuristic device for a project funded by the Social Exclusion Unit located within ODPM, reporting in late 2006 to DCLG as *The Multidimensional Analysis of Social Exclusion* (Levitas et al 2007). It was used to identify the range of information on poverty and especially social exclusion, in existing data sets, with a view to undertaking secondary analysis of data available in existing surveys. It has subsequently been adopted by the new Social Exclusion Task Force as the framework for a programme of analysis. Consequently, while topic areas are identified, questions are not, although the matrix also has the potential to be developed into a module of questions. The existing PSE and FRS data (together with all major household surveys) were assessed against the matrix in the original project. This analysis, together with the results of the proposed qualitative fieldwork and expert group workshop, will inform the development of the questionnaire.

Data Sets Review

As part of the project on *The Multidimensional Analysis of Social Exclusion* (Levitas et al. 2007), a full survey of data sets was undertaken, covering all major household surveys as well as some administrative sources. That concluded that the best sources for looking at poverty and social exclusion in the round, including the widest range of appropriate topic areas, was the PSE. This detailed review by the research team of all available data sets can be downloaded from the Cabinet Office website at

http://www.cabinetoffice.gov.uk/social_exclusion_task_force/publications/multidimensional.aspx

Appendix 6 of this report provides a 'survey of surveys' which includes summary details of the poverty and social exclusion information coverage of the available datasets. Appendix 7 of the report provides an assessment of the quality of the questions available from sample surveys for measuring 50 aspects of poverty and social exclusion, across five population groups of policy interest (Children, Young people (16-24), Working-age adults, Older people 1 (50-60/65), Older people 2 (60/65+)). In total, 27 survey datasets were reviewed in this detailed analysis and all available surveys and administrative datasets, which included poverty and social exclusion relevant data, were included in the preliminary analyses.

Proposed Analysis

Initial processing, non-response and sample bias weighting, analysis and data cleaning will be carried out by the NatCen and NISRA who will produce an anonymised SPSS system file. Rigorous data checks will be undertaken by the University of Bristol and Queen's Belfast research teams prior to the final data distribution to other partners. However, a dummy dataset will be produced once the survey questions have been finalised in order to facilitate the writing of analyses syntax before the data are available. Derived variables, such as those respondents below a range of official poverty thresholds, household type, etc. will be produced by the Bristol team and the syntax will be distributed to all partners for checking and validation.

The research team will undertake univariate and multivariate analyses (e.g. Logistic Regression, Latent Class Factor models, Cox's Proportionate Hazard models, etc.) of poverty and social exclusion aspects for the following topic areas:

Poverty and exclusion in Scotland, employment, neighbourhood and urban and rural issues, longitudinal analysis of linked data

Child poverty and exclusion

Local public and private services (usage, access, exclusion), housing conditions and affordability, of debt and financial exclusion issues

Families and intra household poverty (with Pantazis)

Lone parent families, single person households, parenting and gender issues

Youth poverty and exclusion

Changes in perceptions of poverty

Scientifically identifying the 'poor'

Health and disability

Crime and social harm

UK Living Standards Index

Understanding of social exclusion, both conceptually and empirically

Analysis of longitudinal administrative data held by DWP to identify employment and income dynamics impacts on poverty and social exclusion (with Bailey)

Necessities of life

Ethnic minorities

Older people

Mental health

Poverty and exclusion in Northern Ireland, poverty and conflict

The qualitative interview data will be transcribed and analysed using a 'thematic framework' approach (Ritchie and Lewis, 2003). This approach involves applying a pre-established thematic frame to the data, which will be developed through initial literature review. This framework is then applied to the data through an initial descriptive 'coding' stage. An initial review of data coding will be undertaken with a view to modifying the thematic framework in the light of emerging findings. Following refinement of the thematic framework, a more in-depth conceptual analysis of the interconnections between key themes and dimensions of analysis will be undertaken. Analyses will be assisted by the use of the Computer-Assisted Qualitative Data Analysis Software (CAQDAS) package, *Atlas TI* (version 5 or later).

Publication plans

A book is to be published by Policy Press (sequel to Pantazis et al. (eds) *Poverty and Social Exclusion in Britain: The Millennium Survey*).

Various reports will also be published along with working reports, methodological reports and journal articles

The detailed survey reports and findings, technical survey methodology reports, questionnaires and other practical methodological details will all be made available via the web.

Communication Plans and User Engagement

Dissemination of the results of the 2011 survey and comparisons with the earlier surveys in 1983, 1990 and 1999 will be made available on a dedicated website to be developed by The Open University.

When the full results from the 2011 survey are in, they will be made available on the website in such a way that they can be investigated and compared with the results of the earlier surveys.

Beneficiaries

The ultimate beneficiaries of this research are the men, women and children in the UK who cannot afford the minimum necessities of life. This research aims to advance poverty measurement methodology so that policy makers will have improved scientific evidence to help them better target anti-poverty measures and programmes. Findings from this research will benefit three additional groups: policy makers, anti-poverty advocacy groups and academics.

Policy makers

The research findings will provide policy makers with information from a 'state of the art' survey on the best methods of measuring poverty and social exclusion. This will include comparisons of how the current 'official' measures of poverty and deprivation compare with a broad range of other measures of poverty and social exclusion. Additionally, the Perception of Poverty survey will produce information on the population's perception of necessities in 2010 and how these public perceptions have changed over the previous ten years. The analyses of the main survey results and the FRS Material Deprivation module and the linked benefit and tax records from the Work & Pensions Longitudinal Study (WPLS) will produce information on the dynamics of deprivation, employment and benefit receipt.

By separately presenting findings by demographic and other important classificatory variables (age, gender, ethnicity), policy makers will also be able to identify which particular groups have benefited from Government anti-poverty initiatives and help identify any new groups who may have become impoverished or excluded and as a result in need of new policy attention. In Scotland, it will provide policy makers with greater understanding of the extent of poverty and social exclusion amongst those people included in the new 'Solidarity' target measure. In Northern Ireland, it will provide evidence informing the wider 'Equality Agenda' including the specific groups referred to in Section 75 of the Northern Ireland Act (1998).

Anti-poverty advocacy groups

The study findings will benefit a large number of organisations (100+) including children's charities, child welfare organisations, social justice groups, faith groups, trade unions and others concerned about the unacceptably high levels of child and adult poverty in the UK (for example see

<http://www.endchildpoverty.org.uk>). These organisations will be able to use the study findings and dissemination materials to assist their campaigns to support the Government targets of eradicating child poverty by 2020 and reducing poverty amongst adults. Major organisations involved with the *Campaign to End Child Poverty* include: Barnardo's, Child Poverty Action Group, The Children's Society, The Frank Buttle Trust, NCH, NSPCC and Save the Children. Similarly, Help the Aged, Age Concern and the National Pensioners Convention have active campaigns on poverty and exclusion of older people.

Academics

The primary purpose of this research is to advance scientific knowledge and understanding of how best to conceptualise and measure poverty and social exclusion. This work will be of considerable benefit to the academic and wider poverty research communities. Both will be able to draw upon the theory, methodology and data sets created, which will provide high quality, scientifically valid data that is nationally representative. These data will be accessed through a user-friendly and interactive database. The working papers, books, journal articles produced by this research will contribute to contemporary debates about the measurement of poverty and social exclusion not only in Britain but also internationally. The conference will act as a key forum for discussion and critique of the study and how a similar methodology can be adapted for use in other countries.

Ethical information

This research will be conducted in accordance with the ESRC's Research Ethics Framework. The methodology raises a number of issues which will require detailed consideration and ethical approval. In particular; there are four main areas of concern:

- 1) The recruitment of quantitative and qualitative survey participants requires clear and robust informed consent procedures. Survey respondents will be asked about some issues which are of a sensitive and personal nature. Therefore, support procedures will be put in place to provide help where the need arises.
- 2) Researcher safety is a primary concern when engaging in face to face interviewing in the respondents' own homes. Detailed safety procedures and safety training (where needed) will be required. A formal risk assessment will be produced and submitted to the Ethics Committee.
- 3) Data protection is a significant concern when working with many partners located in different universities and institutions. All data will be anonymised, including ensuring rigorous checks are undertaken to identify and remove any 'special uniques' in the quantitative data before they are released to the wider academic community. Data protection during the analysis phase will include ensuring that all anonymised data are held on secure central servers and, when data are transferred between institutions, they are first encrypted and password protected.
- 4) The recent implementation of primary legislation has made it possible for the first time in the UK to undertake analyses on the dynamics of income, employment and benefit receipt using linked benefit and tax records from the Work & Pensions Longitudinal Study (WPLS). These kinds of analyses raise significant ethical issues and UK ethics committees may need to take advice from their Scandinavian and Australian peers where this kind of research is more routine.

The University of Bristol's research governance framework requires that all research projects must be submitted to the Research Ethics Committee at the University of Bristol for ethical approval.

All research by staff working in other institutions on this project will require approval by the appropriate ethics committee.

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+3 PhD Studentship Proposal

Poverty, Social Exclusion in Britain, 1968-2010: The changing profile of disadvantage

Summary

To date, long-term analyses of trends in vulnerability to poverty and social exclusion in Britain have been frustrated by an absence of consistency in definitions, data sources and measures. This project will draw upon survey data generated by the *2010 Poverty and Social Exclusion Survey* (and earlier national poverty surveys conducted in 1968/9, 1983, 1990 and 1999) in order to generate longitudinally consistent data on trends in poverty and social exclusion at an individual and household level. Using these data, it will then be possible to explore trends in vulnerability to poverty and social exclusion in Britain over a period of more than 40 years. It will also be possible to explore the changing relationship between poverty and wider indicators of social exclusion on the basis of harmonised definitions, data, and methods of analysis. This project will contribute to our understanding of changes in the social and demographic profile of poverty over this period and how this relates to wider dimensions of disadvantage.

Background and rationale

As a result of the work of Townsend (1979) and others, it is now widely accepted that poverty and exclusion are multidimensional concepts which cannot be adequately understood by investigation of income inequalities alone. Nevertheless, differences in the approach taken to the definition and measurement of poverty and exclusion have frustrated efforts to understand the dynamics of disadvantage across time (Hills et al., 2002). At the same, our understanding of the relationship between poverty and wider instances of exclusion remains under-developed not least as a result of the limitations of existing continuous datasets (see Levitas et al., 2007).

In this context, the availability of national poverty surveys conducted in Britain since 1968 - and supplemented by the 2010 survey itself - offer a unique opportunity to investigate trends in poverty and social exclusion using a theoretically consistent approach to the definition and measurement of poverty. The survey datasets relevant to this study are:

- 1967-1969 Poverty in the United Kingdom (Townsend, 1979)
- 1983 Poor Britain Survey (Mack and Lansley, 1985)
- 1990 Breadline Britain Survey of Britain (Gordon and Pantazis, 1997)
- 1999 Poverty and Social Exclusion Survey (Gordon et al., 2000)
- 2010 Survey of Poverty and Social Exclusion (*linked ESRC proposal*)

The 'relative deprivation' approach pioneered by Townsend (1979) has been developed through 'consensual' measurement of poverty and deprivation in the above surveys in 1983, 1990 and 1999. These surveys constitute a theoretically consistent approach to the measurement of poverty based upon scientifically rigorous methods of operationalisation (e.g. Gordon, 1995). By harmonising data and definitions between surveys it is therefore possible to explore long-term changes in poverty and exclusion in Britain since the late 1960s.

A recent major study commissioned by the Joseph Rowntree Foundation has demonstrated the feasibility of this approach in generating longitudinally consistent small area estimates of poverty for the 1968-1999 period (Dorling et al., 2007). This project will extend and develop this approach by examining the changing experience of poverty at an individual and household level over the

wider 1968-2010 period. In doing so, it will contribute to our understanding of the drivers of poverty and social exclusion and the policies needed to tackle them.

Research questions

This study has two broad objectives:

- To inform understanding of changes and continuities in the social and demographic profile of poverty and social exclusion in Britain over the 1968-2010 period
- To explore the relationship between poverty and wider instances of multidimensional disadvantage in Britain, and the extent to which this relationship has changed over the 1968-2010 period

By harmonising data and measurement between surveys, it is possible to address these questions both on the basis of analysis of repeated cross-sections and by analysis of pooled cross-sectional data for the whole 1968-2010 period. The methods to be adopted in investigating the relationship between poverty and exclusion are likely to include appropriate multivariate exploratory methods (e.g. cluster analysis, latent class analysis, factor analysis) as well as conventional multivariate regression approaches. By drawing upon these data and methods this study will address the following research questions:

- How has the social profile of vulnerability to different singular forms of disadvantage changed over this period?
- How has the relationship between indicators of disadvantage changed over the period?
- Which combinations of disadvantage are most prevalent at different time points?
- Which population groups are most vulnerable to multidimensional disadvantage?
- How has the incidence and profile of multidimensional disadvantage changed over the period?

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+3 PhD Studentship Proposal

Poverty, Social Exclusion and the Northern Ireland Conflict: an investigation of social legacies and policy implications

Summary

The legacies of the Northern Ireland conflict are primarily seen as the psychological damage associated with violent events, belonging in policy terms to the support of various victims' groups and the promise of a public exercise in truth and reconciliation which may emerge from the Eames-Bradley Consultative Group on the Past. There is evidence, however, that the legacies are wider and more complex than this.

Analysis of the Northern Ireland Poverty and Social Exclusion (NIPSE) 2002-03 data revealed statistically significant differences in consensual poverty levels for those experiencing particular types and degrees of 'Troubles'-related violence. The proposal is to build on this preliminary analysis in three ways. First, the results on consensual poverty and experience of violence for NIPSE 2002-03 will be compared with the results from NIPSE 2010. Secondly, the social exclusion data from both surveys will be analysed to build a picture of how the conflict is imprinted on patterns of social exclusion. This will focus particularly on mental and physical health and economic and social participation. The third objective will be to draw out policy implications for Northern Ireland's anti-poverty strategy and specific departmental programmes and initiatives.

Background and rationale

Interest in the relationship between poverty and conflict has grown significantly over the past two decades in the wake of widespread disillusionment with the capacity of traditional development policies to improve living standards and reduce conflict (Stiglitz, 2002). Sixteen of the twenty poorest countries in the world have had a major civil war in the last fifteen years (Collier et al, 2003).

One debate is about causation. Blomberg and Hess (2002) reviewed economic development data for 152 countries and found that recessions and associated impoverishment play an important role in determining internal conflicts. They also found that the probability of an internal conflict breaking out increases between two and three times if a recession is coupled with the presence of an external war in the same region. Such findings appear to support the basic assumption behind much development policy that poverty and social exclusion are direct causes of violent conflict. Goodhand (2003), however, argues that there is limited empirical evidence to support or refute the claim that poverty and social exclusion *cause* violent conflict directly. However, he finds much agreement in the literature that poverty, underdevelopment and high levels of inequality, are all high risk factors for armed conflict. In particular, both poverty and inequality are implicated as the contexts in which grievances may become politicised. According to Verstegen (2001) economic *and* political differentiation among groups is of fundamental importance to group mobilisation for civil war and poor governance, particularly state bias towards or against particular groups, is critical.

While most of the poverty and conflict research concerns poorer countries, there is concern in higher income regions that growing income inequalities threaten social cohesion. Again, there is considerable debate over precise empirical associations but there is a large body of evidence that income inequalities impact on crime, violence, homicide and especially on ill-health and life

expectancy (Wilkinson, 1996; Hillyard et al, 2005; Hillyard et al, 2004). The Council of Europe's High-Level Task Force on social cohesion reflects the particular concern that instability and conflict are growing threats in areas where poverty is combined with ethnic, religious or unresolved national divisions (Daly, 2008).

The development of policies to address poverty and social exclusion is also seen as important to the successful resolution of armed conflict or civil wars. As Collier and colleagues (2003) observe, peace agreements tend to be unstable – very few of the peace agreements made during the 1990s survived. The most common outcome of a peace settlement following a civil war is another bout of conflict, unless, that is, the agreement can be bolstered by a whole range of social and other policies to underpin stability and address the legacies of conflict.

Research questions

The NIPSE 2002-03 survey asked questions about the violence people had witnessed and about the impact on participants of the death and injury of close relatives and friends. These questions will be repeated in the NIPSE 2010 survey. The data from both surveys will be used for univariate and multivariate analysis to address the following questions:

- How does the relationship between poverty and experience of violence vary between 2002-03 and 2010?
- How is past experience of violence related to social exclusion, especially mental and physical ill-health, and labour market participation?
- What are the policy implications of the findings for Northern Ireland's anti-poverty strategy and specific departmental programmes and initiatives?

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