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The Survey on Health, Aging and Wealth

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The Survey on Health, Aging and Wealth [•]

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Abstract

Until very recently, health information has been mostly absent from Italian surveys of household budgets and economic conditions. Interest in the association between health outcomes, economic resources and labor market conditions has led us to fill the gap with new microeconomic data. The product of this collective effort is the Survey on Health, Aging and Wealth (SHAW). The survey was commissioned to DOXA, a leading Italian polling agency with considerable experience in the field. The questionnaire is patterned after the US Health and Retirement Survey and the English Longitudinal Study of Ageing (ELSA) project, and covers a range of matters bearing on the relations between health and wealth, aging and wealth, health and retirement. The population sampled is representative of the Italian population over 50. Some of the questions refer to the household (for instance, assets). Others are posed to all 2627 household members. More detailed questions on health status, job outcomes and expectations of future events are asked only to the respondent and spouse, 1765 individuals in total (1068 heads and 697 spouses). These characteristics of the survey make SHAW a unique source for studying the relation between socioeconomic status, health outcomes and health care utilization

- This methodological note on the Survey on Health, Aging and Wealth is part of the research project on The Economics of Aging in Europe financed by the European Union under its Research and Training Network Programme. Funding for the data collection has come from the Italian Ministry of University and Scientific Research and from the European Union under the TMR Research Network on Saving and Pensions. We are grateful for helpful discussions to Giovanni D'Alessio, Luigi Guiso, Raffaele Miniaci, Mario Padula and Franco Peracchi. We also thank Antonia Camarra and Anna Comincini of DOXA for their help.

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The Survey on Health, Aging and Wealth

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1. Introduction

In the past decade the analysis of household behavior has made considerable progress due to the increased availability of microeconomic data-sets on income, labor supply, consumption, portfolio choice, and housing. A major gap of existing Italian surveys that record information on income, wealth and/or consumption, however, is information on health status and health expenditures. Economists are increasingly interested in the relation between health and economic aspects of household behavior, but their research is hampered by lack of suitable, comprehensive surveys.

Until very recently, health information has been mostly absent from Italian surveys of household budgets and economic conditions. Interest in the association between health outcomes, economic resources and labor market conditions, has led a group of researchers later involved in the EC-sponsored SHARE project (Survey on Health, Aging and Retirement in Europe) to fill the gap with new microeconomic data.¹

The product of this first collective effort is the Survey on Health, Aging and Wealth (SHAW). The survey was commissioned to DOXA, a leading Italian polling agency with considerable experience in the field. The questionnaire and the sample design are patterned after the US Health and Retirement Survey and the English Longitudinal Study of Ageing (ELSA) project, which covers a range of matters bearing on the relations between health and wealth, aging and wealth, health and retirement. Focus on the elderly is warranted because major health problems are concentrated in this group and the elderly account for the largest share of medical expenditure.

The SHAW is a full-scale survey in its own right, but can also be seen as the first wave of the new survey, known as SHARE, that is currently being tested in 10 European countries and will in due course (if adequate funding becomes available) be the leading European longitudinal study on the elderly.

The SHAW sample consists of 1068 households whose head is over 50 years old. The population sampled is representative of the Italian population over 50, as described in Section 3. Some of the questions refer to the household (for instance, assets). Others are posed to all 2627 household members; for instance, demographic information and an overall assessment of health status is provided for each household member. More detailed questions on health status, job outcomes and expectations of future events are asked only to the respondent and spouse, 1765 individuals in total (1068 heads and 697 spouses). These characteristics of the survey make SHAW a unique source for studying the relation between socioeconomic status, health outcomes and health care utilization.

In this introduction we describe the main features of the SHAW. Section 2 presents descriptive statistics on the individual and household samples and a comparison with the 2000 Survey of Household Income and Wealth collected by the Bank of Italy. Section 3 focuses on sample selection, data collection and estimation procedures. Section 4 provides information on access to the data, while the Appendix reports the questionnaire.

¹ Agar Brugiavini of the University of Venezia, Luigi Guiso of the University of Sassari, Tullio Jappelli of the University of Salerno, Franco Peracchi of the University of Roma Tor Vergata, and Guglielmo Weber of the University of Padua coordinated the research group.

2. Sample structure

Table 1 presents descriptive statistics on the SHAW sample. The table reports separate estimates for household heads (1068 individuals 50 years or older) and of the sample of heads and spouses (1765 individuals). Given the SHAW sample design, households are selected by a random sample of individuals over 50 (see Section 3.1). In 69 cases the spouse of the selected individual is younger than 50, in 628 cases is 50 years or older, and in 371 cases the spouse is not present.

Among heads and spouses, Table 1 indicates that the proportion of males is 45%, in agreement with demographic data on the Italian population as of the 1st of January 2001, according to which, the percentage of male individuals over 50 is 45%.

It is useful to compare the SHAW sample with the Bank of Italy Survey of Household Income and Wealth for the year 2000 (SHIW). Since that survey is representative of the entire Italian population, we select household heads at least 50 years old. The original SHIW sample consists of 8,001 households and 22,268 individuals. Of these, 4898 are headed by a person at least 50 years old. Including spouses (where present), we obtain a sample of 8077 individuals.

The definition of the household in the two surveys is the same: all individuals living in the same dwelling that, regardless of relationship, provide to the common needs sharing all or part of income of its members. However, the definition of the head is different: it is the individual randomly selected in the SHAW sample, and the person that is responsible for family matters in the SHIW. For this reason, the information on the head in the two surveys is not comparable, and for the SHIW we report the combined information on heads and spouses (8077 individuals).

We see from Table 1 that the gender split is roughly the same for SHAW and the comparable SHIW sub-sample. The SHAW sample has 60% individuals in the 50-65 age group, 8% more than in SHIW. SHAW also has more educated individuals (52% have completed secondary education, as opposed to 43% in SHIW) and a lower proportion of retired. The proportion of households resident in the three broad regions is roughly the same across the two surveys.

The great attraction of SHAW compared to SHIW, or any other existing survey (such as the ISTAT-run Multi-Purpose Survey on Health, MPSH, for instance), is its comprehensive nature. Most aspects of household behavior are covered that are likely to be relevant for an economist. Like SHIW, SHAW contains information on income and wealth, as well as on the household structure and on subjective expectations. Like the MPSH, it covers health status, health spending patterns and informal family support. Unlike any other Italian survey, questions on all such diverse topics are asked to the same sample, thus making the analysis of their interaction possible, as shown in the papers presented here.

3. Sample selection, interviews, and estimation procedures

The SHAW was carried out between September 15 and October 24 of 2001 by professional interviewers of the DOXA Institute, a leading institution in the field of data collection.

3.1 Sample selection

In order to obtain a representative sample of the population over 50 years old, the population was first divided in strata, according to region and city size. The number of interviews in each stratum is proportional to the distribution of individuals over 50 years old living in the different strata.

Sampling units (cities, city areas, and individuals) were then chosen within each stratum through a three-stage selection process. In the first step, cities were selected within the “Doxa network”. In the second step, 3 electoral sections were randomly selected in each city (each electoral section represents a certain city area). In the third step, individuals were randomly selected from the electoral register among all those born in 1951 or earlier.² Table 1 reports the distribution of the interviews by region and city size. Overall, interviews took place in 19 regions and 103 cities.

While the individual randomly selected is over 50 years old, the questionnaire elicits information also on all other household members (spouse, children and other individuals, if present), regardless of age.

3.2. The questionnaire

The questionnaire was tested in July of 2001 on a pilot sample of 100 units from all over the country. The pilot led to extensive revisions and refinements of the questionnaire. The final questionnaire, reported in the Appendix, is divided into 7 main sections:

- A. Interviewer's notes
- B. Household structure
- C. Employment and income
- D. Wealth and dwelling
- E. Household health
- F. Individual health
- G. Health and work
- H. Expectations

Sections B, D and E are addressed to each household member, while sections C, F, G and H are addressed to the head of the household and to his/her spouse (if any). Information on household structure, income and wealth refer to the end of 2000.

² In 18 locations the municipality did not allow access to the electoral register. In these towns, the sample was therefore selected by a random walk procedure (129 interviews, corresponding to 12% of the total sample).

Particular effort has been put to obtain reliable estimates of income and wealth. For each category of income, financial assets, real assets and debt the respondent is asked whether they hold any assets in this category. If so they are asked to give a value for their total holdings in this category. Respondents who refuse or report don't know at this stage are then routed into unfolding brackets – a short series of follow up questions of the form: "Is it more or less than x ?" The methodology is informed by evidence from the US where it is already being used in both the Panel Study of Income Dynamics and the Health and Retirement Survey.³

Unfolding brackets are not used for each section of the questionnaire. To simplify the questionnaire, the sample was randomly divided in two groups:

- in questionnaires with an even number (528) the unfolding brackets questions concern household's dwelling and financial assets at the end of 2000;
- in questionnaires with an odd number (540) the unfolding brackets questions concern after-tax household income, market value of real estate, family business and any debt as at the end of 2000.

Minimum and maximum in the unfolding brackets questions change according to the particular variable under analysis. The specific values are based on quartiles of the distribution of the total amount drawn from the population over 50 of the Bank of Italy 1998 Survey of Household Income and Wealth.

3.3. The interviews

Interviews were obtained by the CAPI method (Computer Assisted Personal Interviewing). The computer program stores information given by the respondent and sorts out possible inconsistencies during the interview through specific filters. Before the interview, the Doxa Institute sent a letter to the household, guaranteeing their anonymity and explaining the survey purpose.

The response rate, defined as the ratio of interviewed households (1068) and the number of households contacted for the interview (3941), is 27.1%. The response rate appears to be in line with comparable surveys. In the non-panel section of the 2000 SHIW the response rate is 27.5 percent.

Table 2 reports the most frequent reasons for refusal. At the end of the interview, the interviewer evaluates its quality, assigning a mark between 1 (poor) and 10 (excellent) to each issue. Moreover, the interviewer's opinion is also used to know where the respondent lives, the kind of dwelling, standard of living, etc. Table 3 reports the average length of the interview, an indicator of the reliability of the wealth questions according to the interviewer, and the level of interest of the respondent about the health questions.

The interview is longer when the householder has a university degree or is self-employed. Its length also increases with the number of household members. The average reliability of

³ Juster, T., and J.P. Smith (2000), "Improving the quality of economic data: Lessons from the HRS and AHEAD," *Journal of the American Statistical Association* 92, 1268-78.

wealth variables is 7.9. Households living in the North and employed achieve a higher score. On average, the interest on health topics is 7.7. It is higher in the Centre and in the North, and when the respondent is retired or not employed.

4. Access to the data and concluding remarks.

The individual-level data have been provided by DOXA in anonymous format to the principal investigators. A user-friendly data set has then been prepared and is available upon request as a STATA data-set for non-commercial use. Further documentation on the data is also freely available, including a report prepared by Fort that compares SHAW with SHIW 1998.⁴

We very much hope that the wealth of information contained in SHAW will be tapped upon by academic researchers for all types of interdisciplinary research, thus proving the need for similar comprehensive surveys.

⁴ Fort, Margherita (2002) “The 2001 Survey on Health, Aging and Retirement”, University of Padua, *mimeo*.

Table 1
The sample

	<i>SHAW</i>		<i>SHIW</i>
	<i>Head</i>	<i>Head and Spouse</i>	<i>Head and spouse</i>
Sex			
Male	0.54	0.44	0.44
Female	0.46	0.56	0.56
Age			
Less than 50	--	0.04	0.06
From 50 to 65	0.59	0.60	0.52
Over 65	0.41	0.36	0.42
Education			
None	0.10	0.09	0.13
Primary school (5 years)	0.39	0.39	0.44
Secondary school (8 years)	0.23	0.26	0.21
High school (13 years)	0.21	0.20	0.17
University degree or higher	0.06	0.06	0.05
Working Status			
Employed	0.18	0.16	0.16
Self-employed	0.10	0.09	0.07
Retired	0.54	0.48	0.56
Other	0.18	0.27	0.21
No. of household members			
1 member	0.23	0.14	0.17
2 members	0.34	0.38	0.38
3 members	0.23	0.26	0.22
4 members	0.14	0.16	0.17
5 members or more	0.06	0.06	0.07
Geographical area			
Northern Italy	0.44	0.43	0.45
Central Italy	0.19	0.20	0.19
Southern Italy and Islands	0.37	0.37	0.36
Total	1,068	1765	8077

Table 2
Number of interviews according to region and city size

<i>Region</i>	<i>Number of cities</i>	<i>City size</i>				<i>Total</i>
		<i>Less than 10,000</i>	<i>10,000 / 50,000</i>	<i>50,000 / 250,000</i>	<i>250,000 and over</i>	
Piemonte	7	31	20	6	20	77
Lombardia	13	68	46	21	25	160
Trentino Alto Adige	2	8	1	0	0	9
Veneto	9	37	27	12	8	84
Friuli Venezia Giulia	3	12	8	9	0	29
Liguria	4	9	8	4	12	33
Emilia Romagna	8	20	23	26	8	77
Toscana	8	16	28	17	8	69
Umbria	1	0	0	12	0	12
Marche	2	11	10	0	0	21
Lazio	6	20	24	8	48	100
Abruzzo	4	16	8	7	0	31
Campania	10	28	44	24	20	116
Puglia	7	12	36	22	8	78
Basilicata	3	16	0	12	0	28
Calabria	4	7	15	0	0	22
Sicilia	8	21	31	16	20	88
Sardegna	4	16	10	8	0	34
Total	103	348	339	204	177	1,068

Table 3
Reasons for refusing the interview

No time	1,370
The interview is too long	147
The interviewee is sick	240
The interviewee does not like strangers to come in	630
The interviewee does not provide information essential for the interview	312
Other/The interviewee does not provide reasons for refusal	903
Total	3,941

Table 4
Contact attempts and quality of the interviews

	<i>Number of household heads</i>	<i>Average length of the interview (in minutes)</i>	<i>Quality of wealth questions according to the interviewer</i>	<i>Respondent's interest on health questions</i>
Sex				
Male	578	43.2	7.7	7.8
Female	490	37.5	7.7	7.9
Age				
From 50 to 65	634	43.2	7.9	8.2
Over 65	434	38.0	7.6	8.0
Education				
None	109	36.3	7.1	7.3
Primary school (5 years)	419	41.1	7.8	8.0
Secondary school (8 years)	249	39.6	7.8	7.9
High school (13 years)	223	41.6	7.8	7.9
University degree or higher	68	44.6	7.7	8.1
Working Status				
Employed	192	42.7	8.0	7.8
Self-employed	109	41.4	7.5	7.7
Retired	576	38.0	7.7	8.0
Other	191	41.2	8.0	8.2
No. of household members				
1 member	245	33.2	7.7	7.6
2 members	368	40.7	7.7	7.9
3 members	248	43.6	7.6	8.0
4 members	147	44.6	7.8	8.0
5 members or more	60	47.6	8.1	8.0
Geographical area				
Northern Italy	470	40.4	8.1	7.9
Central Italy	201	40.9	7.6	8.0
Southern Italy and Islands	397	40.6	7.2	7.7
Total	1,068	40.6	7.9	7.7

Appendix

Survey on Health, Aging and Wealth

Questionnaire and variables' names

STRICLY CONFIDENTIAL	<p>DOXA</p> <p>STATISTIC RESEARCH AND SURVEY OF PUBLIC OPINION INSTITUTE MILAN - Via B. Panizza, 7 - Tel no. 02-48.19.32.76 - Fax : 02-48.19.32.86 – E-mail: doxa@doxa.it</p> <p>SURVEY ON HEALTH, AGING AND WEALTH</p>	<i>Interviewer:</i> _____ <i>Interview No.</i> _____ <i>Date:</i> _____ <i>Town:</i> _____
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EVEN	<input type="checkbox"/>
ODD	<input type="checkbox"/>

- Section A. Interviewer's notes**
- Section B. Composition of Household at end of 2000**
- Section C. Employment and Income**
- Section D. Wealth and Dwelling**
- Section E. Household Health**
- Section F. Individual Health**
- Section G. Health and Work**
- Section H. Expectations**
- Section A. Final Interviewer's notes**

Questions in sections B, D and E are asked to the reference person only.

Questions in sections F, C, G, and H are asked to the reference person and to his/her spouse.

Section A - INTERVIEWER'S NOTES

A1	No. of questionnaire	INTNR
A2	Date of interview	V1
A3	Time of interview	
A4	Province of residence (ISTAT code)	ProvRes
A5	Region of residence (ISTAT code)	V6050

THE REFERENCE PERSON is the person aged 50 or above who has been drawn from the electoral registry.

SECTION B - COMPOSITION OF HOUSEHOLD AT END OF 2000

B1. Can you please list all household members as of 31 December 2000 (include everybody that normally lived in this dwelling as of 31 December 2000 who contributed at least part of their income to the household. Also include any members temporarily absent, e.g. on vacation, temporarily away for study, etc., and any other non-relatives that lived stably in the household as of 31 December 2000)

Number of persons **V41_1** (number of persons living in this household, including children, as of 31 December 2000)

	Members of the household						
B2 Member number: _1 to _7 except otherwise noted	Reference person ↓ 1	2	3	4	5	6	7
NAME V2							
B3 Gender V3							
Male	1	1	1	1	1	1	1
Female	2	2	2	2	2	2	2
B4 Household position V4_1 for member 2 to V4_6 for member 7							
Reference person (R.P.)	1	1	1	1	1	1	1
Spouse/Partner of R.P.		2	2	2	2	2	2
Son/Daughter of R.P.		3	3	3	3	3	3
Parent of R.P.		4	4	4	4	4	4
Other relative of R.P.		5	5	5	5	5	5
Other household member not related to R.P.		6	6	6	6	6	6
B5 Place of birth RegNasc							
If in Italy, enter ISTAT regional code.	_ _	_ _	_ _	_ _	_ _	_ _	_ _
If foreign country, →	999	999	999	999	999	999	999
B6 Year of birth V6							
	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _
B7 Marital status V7							
Married	1	1	1	1	1	1	1
Single	2	2	2	2	2	2	2
Separated/Divorced	3	3	3	3	3	3	3
Widow/Widower	4	4	4	4	4	4	4
B8 Educational Qualification V8							
None	1	1	1	1	1	1	1
Elementary School (5 years)	2	2	2	2	2	2	2
Middle School (8 years)	3	3	3	3	3	3	3
High School (10 to 13 years)	4	4	4	4	4	4	4
Bachelor's Degree (16 years or more)	5	5	5	5	5	5	5
Post-graduate qualification	6	6	6	6	6	6	6

Grown-up children away from home

B9...B15 are asked to the reference person

B9 Did you have any grown-up children who were not living with you at the end of 2000? V271	YES 1	NO 2
If YES B9a How many children? V275_1		
No. children away from home →	_ _	

List your own children's names (from the oldest to the youngest), their marital status, employment, income and how far they live from you.

Sequence of children away from home _1 to _7	1	2	3	4	5	6	7
Children's name V279							
B10 Gender V281							
Male	1	1	1	1	1	1	1
Female	2	2	2	2	2	2	2
B11 Year of birth V285	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _
B12 Marital Status V290							
Married	1	1	1	1	1	1	1
Single	2	2	2	2	2	2	2
Separated/Divorced	3	3	3	3	3	3	3
Widow/Widower	4	4	4	4	4	4	4
B13 Grandchildren (if any) In 2000, did (name) have any children?) V295 If yes: How many?							
Number of grandchildren of the interviewee V297 →	_ _	_ _	_ _	_ _	_ _	_ _	_ _
B14 In 2000 did ... (children's name) have any job? V300							
YES	1	1	1	1	1	1	1
NO	2	2	2	2	2	2	2
B15 In 2000, within what distance from your place was ... (children's name) living? V310							
Short distance (less than 20 min. walking)	1	1	1	1	1	1	1
Medium distance (less than 30 min. by car)	2	2	2	2	2	2	2
Long distance (more than 30 min. by car)	3	3	3	3	3	3	3

Member number <u>_1 to _7</u>	1 R.P.	2	3	4	5	6	7
Name V9							
OWN INCOME							
B16 Let's consider all adult members living with your household at the end of 2000. Did ... (name) receive any income from employment, self-employment, pension, rents or other income? For each household member, report income source							
- No income at all V9_1	1	1	1	1	1	1	1
- Income from <u>employment</u> V9_2	2	2	2	2	2	2	2
- Income from <u>self-employment</u> V9_3	3	3	3	3	3	3	3
- Income from <u>old-age pension, retirement pension, survivor's or war pension</u> V9_4	4	4	4	4	4	4	4
- Income from <u>private pension</u> V9_5	5	5	5	5	5	5	5
- Income from any other pension, or transfer (social pension, disability pension, subsistence pension, etc) V9_6	6	6	6	6	6	6	6
- <u>Capital Income</u> (interest, rents,) (<i>Interviewer: please, focus attention on capital incomes</i>) V9_7	7	7	7	7	7	7	7

B17 On the basis of the income sources that you have listed above, which was the <u>average monthly net income</u> of your household in 2000? Please, consider any household members' income that you know (including the year-end and holiday bonuses, that is 13 th and 14 th monthly salary). <i>Interviewer: remind the interviewee that all information provided will be used for statistic purpose only.</i>	Monthly Income Italian lire V161_1
--	---

Reports income V161

YES 1
NO 2

IF THE INTERVIEWEE DOES NOT REPORT INCOME, ASK UNFOLDING BRACKETS QUESTIONS (ODD QUESTIONNAIRES ONLY)

B17a Was the net monthly income of your household BELOW or ABOVE 7 millions lire? **V162**

- Above 1
- Below 2
- Doesn't say 3

(If "below" or "doesn't say")

B17b Was the net monthly income of your household BELOW or ABOVE 5 millions lire? **V163**

- Above 1
- Below 2
- Doesn't say 3

(If "below" or "doesn't say")

B17c Was the net monthly income of your household BELOW or ABOVE 3 millions lire? **V164**

- Above 1
- Below 2
- Doesn't say 3

B18 How much do you usually spend in a month for <u>foodstuff</u> ? Consider food bought in shops and supermarkets as well as <u>meals consumed regularly outside</u> . Think about <u>average monthly expenditure</u> in 2000	Monthly Expenditures Italian lire V15_1
---	--

Section C - EMPLOYMENT AND INCOME

	Reference person responds in person	Spouse responds in person YES=1, NO=2
Member number _1 and _2 except where noted otherwise	YES	V410_2

C1 Was ... (*name*) employed as of 31 December 2000? Which was his/her main job? **V430**

<i>Employee</i>	
Blue-collar worker or similar (including apprentices and home workers)	1
Office worker	2
School teacher in any type of school	3
Junior manager or cadre	4
Manager, senior official, principal, headmaster, university teacher, magistrate.	5
Other	6
<i>Self-employed</i>	
Member of arts or professions	7
Sole proprietor	8
Free lance	9
Owner or member of a family business	10
Active shareholder/partner	11
Other (contingent worker on none account, other)	12
<i>Not employed</i>	
Unemployed	13
Home maker	14
Well off	15
Job pensioner	16
Non-job pensioner (disability, survivor's, social pension)	17
Other	18

Notes to question C1 (explain to the interviewee, if necessary)

- Member of the Arts or Professions:** Somebody who runs his/her own professional activity
- Sole trader:** Somebody who runs his/her own business employing salaried staff
- Free lance:** Somebody who runs his/her own business employing own labor
- Owner or member of family business:** Somebody who runs a business employing his/her own or other relatives co-operation
- Active shareholder/partner:** Somebody who owns a business stocks or shares and works or manages it

If unemployed or job pensioner in question C1.

C2 Before becoming a pensioner or unemployed, what was ...(name)'s employment status? **V440**

<i>Employee</i>	
Blue-collar worker or similar (including apprentices and home workers)	1
Office worker	2
School teacher in any type of school	3
Junior manager or cadre	4
Manager, senior official, principal, headmaster, university teacher, magistrate.	5
Other	6
<i>Self-employed</i>	
Member of arts or professions	7
Sole proprietor	8
Free lance	9
Owner or member of a family business	10
Active shareholder/partner	11
Never employed	12
Other	13

If employed, job pensioner or unemployed to question C1

C3 Indicate the branch of activity of the company in which the member works/worked **V445**

Agriculture, hunting, fishing, fish-farming and related services	1
Mining, food products, beverages and tobacco products, textiles, clothing, leather products, timber, wooden products, furniture, paper, chemical and metal products, other manufactures, production and distribution of electric power, gas and water.	2
Building and construction	3
Wholesale and retail trade, repair of motor vehicles and motorcycles, lodging and catering services.	4
Transport, warehouse, storage and communication services	5
Credit and insurance companies	6
Real estate and renting services, IT services, research, other professional and business activities	7
Domestic services provided to private households and other private services	8
General government, defense, education, health and other public services.	9
Extraterritorial organizations	10
Other	11

Earnings

C4 How old was... (name) when he/she began to work? (consider his/her first job)	V450
(To all employed or retired household members)	
C5 At what age are you planning to retire (did you retire)?	V460
(To retired members)	
C6 When ... (name) retired, how much did he/she receive as severance pay from his/her last employer? (Italian lire)	V470
C7 In 2000 did ... (name) receive any income from <u>employment</u> , full time or part time, on a permanent or occasional basis? (YES=1, NO=2)	V480
IF YES:	
C8 In 2000, how much did you receive in total, after taxes and social security contributions, from your <u>employment</u> ? Consider year-end bonus, general bonuses, special allowances, etc. Do not include severance pay or tax contributions. (Italian lire)	V490
C9 In 2000, did you receive any income from <u>self-employment</u> , as a member of professions, sole trader, active shareholder or partner? (YES=1, NO=2)	V500
IF YES:	
C10 In 2000, how much did ... (name) totally earn after tax from <u>self-employment</u> ? Consider any income after taxes and expenses. (Italian lire)	V510

Other incomes

C11 In 2000, did you receive any <u>income from pensions</u> ? Consider all types of pensions: occupational, disability, retirement, non-contributory, survivor's, and private pensions (life annuities) (YES=1, NO=2)	V530
IF YES:	
C12 In 2000, how much did you receive in pensions <u>per month</u> ? (Italian lire)	V540
C13 In 2000, did you receive any <u>other income</u> such as insurance payments, life and health insurance, occupational mobility allowance, unemployment benefits, financial support from government, transfers from friends or relatives not living with your household, alimony, other transfers? (YES=1, NO=2)	V550
IF YES:	
C14 In 2000, what was the total amount of these incomes? (Italian lire)	V560
C15 In 2000, did you receive any income from your properties (dwellings, lands etc.) or any other financial income, such as interests from bank accounts, dividends, interests from bonds? (YES=1, NO=2)	V570
IF YES:	
C16 How much was the total amount of these incomes? (Italian lire)	V580

Section D - WEALTH AND DWELLING

Let's now deal with your household financial wealth, that is to say dwellings, bank accounts, bank or postal savings books, securities, shares, real estates, etc. Please, list what kind of savings you or your household members have. We remind you that the questionnaire is strictly confidential and any information will be used for statistic purposes only.

Financial assets

Did you or any of your household members have **(read and code)**

How much was the total amount of **(read and code)** held by your household at the end of 2000?

	OWNS (YES=1, NO=2)	Reports amount (YES=1, NO=2)	Amount as of 31-12- 20000 - Italian Lire
D1 Bank current accounts deposits	V1010_1	V1020_1	V1021_1
D2 Bank savings deposits (registered or bearer savings books)	V1010_2	V1020_2	V1021_2
D3 Post Office current accounts and Post Office deposit books	V1010_3	V1020_3	V1021_3
D4 Postal savings certificates	V1010_4	V1020_4	V1021_4
D5 Deposit certificates and repurchase agreements	V1010_5	V1020_5	V1021_5
D6 Italian Government securities (BOT, CCT, BTP, others)	V1010_6	V1020_6	V1021_6
D7 Corporate bonds	V1010_7	V1020_7	V1021_7
D8 Mutual funds and other managed investment accounts	V1010_8	V1020_8	V1021_8
D9 Shares (listed or non-listed, Italian o foreign)	V1010_9	V1020_9	V1021_9
D10 Other	V1010_10	V1020_10	V1021_10

IF "OWNS" IN QUESTIONS D1-D10 BUT AMOUNT IS NOT REPORTED, ASK THE UNFOLDING BRACKETS QUESTIONS (EVEN QUESTIONNAIRES ONLY)

D1a. Is the total amount of your bank current accounts BELOW or ABOVE 15 millions lire? **V1022_1**

- Above 1
- Below 2
- Doesn't say 3

(If "below" or "doesn't say")

D1b. Is the total amount of your bank current accounts BELOW or ABOVE 5 millions lire? **V1025_1**

- Above 1
- Below 2
- Doesn't say 3

D2a. Is the total amount of your bank savings deposits BELOW or ABOVE 15 millions lire? **V1022_2**

- Above 1
- Below 2
- Doesn't say 3

(If "below" or "doesn't say")

D2b. Is the total amount of your bank savings deposits BELOW or ABOVE 5 millions lire? **V1025_2**

- Above 1
- Below 2
- Doesn't say 3

- D3a.** Is the total amount of your Post Office current accounts and deposit books BELOW or ABOVE 15 millions lire? **V1022_3**
- Above 1
 - Below 2
 - Doesn't say 3

(If " below " or "doesn't say")

- D3b.** Is the total amount of your Post Office current accounts and deposit books BELOW or ABOVE 5 millions lire? **V1025_3**
- Above 1
 - Below 2
 - Doesn't say 3

- D4a.** Is the total amount of your postal savings certificates BELOW or ABOVE 15 millions lire? **V1022_4**
- Above 1
 - Below 2
 - Doesn't say 3

(If " below" or "doesn't say")

- D4b.** Is the total amount of your postal savings certificates BELOW or ABOVE 5 millions lire? **V1025_4**
- Above 1
 - Below 2
 - Doesn't say 3

- D5a.** Is the total amount of your deposit certificates and repurchase agreements BELOW or ABOVE 50 millions lire? **V1022_5**
- Above 1
 - Below 2
 - Doesn't say 3

(If " below" or "doesn't say")

- D5b.** Is the total amount of your deposit certificates and repurchase agreements BELOW or ABOVE 20 millions lire? **V1025_5**
- Above 1
 - Below 2
 - Doesn't say 3

- D6a.** Is the total amount of your Government securities (BOT, CCT, BTP, others) BELOW or ABOVE 50 millions lire? **V1022_6**
- Above 1
 - Below 2
 - Doesn't say 3

(If " below" or "doesn't say")

- D6b.** Is the total amount of your Government securities (BOT, CCT, BTP, others) BELOW or ABOVE 20 millions lire? **V1025_6**
- Above 1
 - Below 2
 - Doesn't say 3

- D7a.** Is the total amount of your corporate bonds BELOW or ABOVE 50 millions lire? **V1022_7**
- Above 1
 - Below 2
 - Doesn't say 3

(If " below" or "doesn't say")

- D7b.** Is the total amount of your corporate bonds BELOW or ABOVE 20 millions lire? **V1025_7**
- Above 1
 - Below 2
 - Doesn't say 3

- D8a.** Is the total amount of your mutual funds and other managed accounts BELOW or ABOVE 50 millions lire? **V1022_8**
- Above 1
 - Below 2
 - Doesn't say 3

(If "below" o "doesn't say")

- D8b.** Is the total amount of your mutual funds and other managed accounts BELOW or ABOVE 20 millions lire? **V1025_8**
- Above 1
 - Below 2
 - Doesn't say 3

- D9a.** Is the total amount of your shares BELOW or ABOVE 50 millions lire? **V1022_9**
- Above 1
 - Below 2
 - Doesn't say 3

(If "below" o "doesn't say")

- D9b.** Is the total amount of your shares BELOW or ABOVE 20 millions lire? **V1025_9**
- Above 1
 - Below 2
 - Doesn't say 3

- D10a.** Is the total amount of any other asset (not mentioned above) BELOW or ABOVE 50 millions? **V1022_10**
- Above 1
 - Below 2
 - Doesn't say 3

(If "below" o "doesn't say")

- D10b.** Is the total amount of any other asset (not mentioned above) BELOW or ABOVE 20 millions? **V1025_10**
- Above 1
 - Below 2
 - Doesn't say 3

House

D11 The place where you were living (house or flat) at the end of 2000 was: V1050 - owned by your household - rented, subleased - occupied under redemption agreement - held in usufruct - occupied free of charge (i.e. owned by friends or relatives who let it in exchange for care-taking and cleaning)	1 2 3 4 5
D12 <u>If you were renting</u> . How much did you pay for rent <u>every month</u> (Do not include heating and communal expenses)? V1060_1	Monthly: _____ Italian lire
D13 <u>If owned, under redemption agreement or usufruct</u> . In your opinion, if you decided to let your flat/house, what <u>monthly</u> rent could you get? (Do not include heating and communal expenses) V1070_1	Monthly: _____ Italian lire
D14 In your opinion, what would be the price of your flat/house if you decided to sell it (<u>unoccupied</u>)? That is to say, how much is your flat/house worth? V1080_1	_____ Italian lire

IF AMOUNT IN QUESTION D14 IS NOT REPORTED, ASK UNFOLDING BRACKETS QUESTIONS (EVEN QUESTIONNAIRES ONLY)

D14a Is the market value of your house/flat BELOW or ABOVE 300 millions lire? **V1082**

- Above 1
- Below 2
- Doesn't say 3

(Se "below" o "doesn't say")

D14b Was the market value of any other property of yours BELOW or ABOVE 150 millions lire? **V1085**

- Above 1
- Below 2
- Doesn't say 3

D15 Since when you and your household have been living in this flat/house? V1090_1 .	Year _____
D16 How many rooms are there in this house/flat? (<i>include every room and facilities</i>) V1100 - 1 room - 2 rooms - 3 rooms - 4 rooms - 5 rooms - 6 rooms - 7 rooms - more that 7 rooms	1 2 3 4 5 6 7 8
D17 On which floor is your flat? (<i>If it is on more than one floor, consider the hall</i>) V1110 - Ground floor - First floor - Second floor - Third floor - Fourth floor - Fifth floor - Sixth floor - Seventh floor - Eighth floor - Ninth floor - Tenth floor - Other	2 3 4 5 6 7 8 9 10 11 12 13
If it is not on the "ground floor" to question D17 V1120 D18 Is there a lift? - YES - NO	1 2

Other Properties

ODD QUESTIONNAIRES

D19a At the end of 2000, did you or any other member of your household own other dwellings, buildings such as shops, offices, basements, or lands? (Directly or under redemption agreement) **V1200**

YES 1
NO 2

IF YES:

	Reports value (YES=1, NO=2)NO	Total amount at the end of 2000 (lire)
D19b At the end of 2000, what is the value of these properties?	V1210	V1220_1

IF AMOUNT IS NOT REPORTED, ASK THE UNFOLDING BRACKETS QUESTIONS

D19.1 Is the total amount of any other property BELOW or ABOVE 300 millions lire? **V1230**

- Above 1
- Below 2
- Doesn't say 3

(If "below" or "doesn't say")

D19.2 Is the total value of any other property BELOW or ABOVE 150 millions lire? **V1240**

- Above 1
- Below 2
- Doesn't say 3

D20a Did you or any member of your household own a firm/company or business activity, at the end of 2000? **V11200**

YES 1
NO 2

IF YES:

	Reports value (YES=1, NO=2)NO	Total amount at the end of 2000 (lire)
D20b How much could you get if you decided to sell it, at the end of 2000? (consider all the equipment, machinery and eventual license or patents)	V11210	V11220_1

IF AMOUNT IS NOT REPORTED, ASK THE "UNFOLDING BRACKETS" QUESTIONS

D20.1 Was the amount of your firm/company/business activity BELOW or ABOVE 300 millions lire? **V11230**

- Above 1
- Below 2
- Doesn't say 3

(If "below" o "doesn't say")

D20.2 Was the amount of your firm/company/business activity BELOW or ABOVE 150 millions lire? **V11240**

- Above 1
- Below 2
- Doesn't say 3

EVEN QUESTIONNAIRES:

D19a-D20a-D21a At the end of 2000, did you or any other member of your household own any other dwellings or other buildings such as shops, offices, basements or lands?

IF YES: At the end of 2000, what kind of properties did you or any other member of your household own?

D19b-D20b-D21b At the end of 2000, what was the sale value of your properties?

	Owns (YES=1, NO=2)	Reports value (YES=1, NO=2)	Amount as of 31-12- 20000 - Italian Lire
D19 <u>Other properties</u> , holiday homes, let or lent to relatives and friends, used for professional activities or left in usufruct?	V1300_1	V1320	V1330_1
D20 <u>Any other non-housing buildings</u> , such as shops, offices, hotels, warehouses, basements, garages, sheds	V1300_2	V1321	V1331_1
D21 <u>Agricultural and non-agricultural lands</u> (joined or separated from the house)	V1300_3	V1322	V1332_1
D21 <u>None of the above</u>	V1300_4		

D22a. At the end of 2000, did you or any other member of your household own a firm/company or business activity?

IF YES:

D22b. At the end of 2000, how much could you get if you decided to sell it? (consider all the equipment, machinery and eventual permits)

	Owns (YES=1, NO=2)	Reports value (YES=1, NO=2)	Amount as of 31-12- 20000 - Italian Lire
D22 Firm/company/business activity	V21200	V21210	V21220_1

Other properties

ODD AND EVEN QUESTIONNAIRES

	Owns (YES=1, NO=2)	Amount as of 31-12-2000 - Italian Lire
D23 At the end of 2000, did you or any other member of your household own any <u>precious objects</u> ? IF YES: How much are they worth? Consider how much could you get if you sold them	V1350	V1360_1
D24 At the end of 2000, did you or any other member of your household own any vehicles such as cars, motorbikes, boats, etc.? IF YES: How much are they worth? Consider how much could you get if you sold them	V1370	V1380_1
D25 At the end of 2000, did you or any other member of your household own any furniture, furnishings, and appliances? IF YES: How much are they worth? Consider how much could you get if you sold them	V1390	V1410_1

Debts

D.26a Do you or any other member of your household have any debt (such as mortgages, personal bank loan, consumer credit, loans from relatives or friends) to meet family needs or connected to your/his/her business (private-owned enterprise, such as professional offices or family business)

IF YES:

D.26b At the end of 2000, what was the total amount of your mortgage and your household's debts?

	Has debt (YES=1, NO=2)	Reports value (YES=1, NO=2)	Amount as of 31-12- 20000 - Italian Lire
D26 Debts incurred to buy or renovate real estates, to buy consumer goods, to finance your own business	V1500	V1520	V1521_1

IF AMOUNT IS NOT REPORTED, ASK THE UNFOLDING BRACKETS QUESTIONS (ODD QUESTIONNAIRES ONLY)

D26.1 Was your total debt amount BELOW or ABOVE 20 millions lire? **V1522**

- Above 1
- Below 2
- Doesn't say 3

(If "below" or "doesn't say")

D26.2 Was your total debt amount BELOW or ABOVE 10 millions lire? **V1523**

- Above 1
- Below 2
- Doesn't say 3

Insurance policies and private pensions

In 2000 did you or any other member of your household have any ... (*read and code*)

IF YES:

How much is the total amount that your household pays for ... ? (*type of insurance policy*)

	Pays (YES=1, NO=2)	Contribution in 2000 (Italian lire)
D27 Life insurance	V1600_1	V1610_1
D28 Private pension, life annuity, any other insurance saving	V1600_2	V1610_2
D29 Private health insurance (sickness and accidents)	V1600_3	V1610_3
D30 Indemnity insurance (theft, fire, other insurance except compulsory car liability insurance)	V1600_4	V1610_4

Section E – HOUSEHOLD HEALTH

	Members of the Household						
Member number _1 to _7	Reference person 1	2	3	4	5	6	7
Name							
E1 Would you say that the general health of your household at the end of 2000 was V2010							
– Very good	1	1	1	1	1	1	1
– Good	2	2	2	2	2	2	2
– Fair	3	3	3	3	3	3	3
– Poor	4	4	4	4	4	4	4
– Very poor	5	5	5	5	5	5	5
E2 During 2000, did ... (name) have any illness or health problem? (please, consider any illness which required medical treatments) V2020							
– YES	1	1	1	1	1	1	1
– NO	2	2	2	2	2	2	2
IF YES, ask questions E3-E4-E5							
E3 Did the above mentioned health problems affect any of (name) usual activities (at home, at school, leisure, etc.)? V2030							
– YES	1	1	1	1	1	1	1
– NO	2	2	2	2	2	2	2
IF YES:							
E4 How long did he/she have to stay in bed, in 2000?							
– Number of days V2040	_____	_____	_____	_____	_____	_____	_____
E5 In order to cure his/her health problems does he/she follow any medical treatment or take any medicines on a regular basis? V2050							
– YES, almost every day	1	1	1	1	1	1	1
– YES, once a week, at least	2	2	2	2	2	2	2
– NO, he/she does not take any medicines on a regular basis	3	3	3	3	3	3	3

Section F - INDIVIDUAL HEALTH

Questions G1-G20 are asked to the reference person (household member #1) and to the spouse (if present).

	Reference person responds in person	Spouse responds in person YES=1, NO=2
Member number _1 and _2 except where noted otherwise	YES	V3010_2

F1 Do you have any long term illness, which could be described as chronic illness? [Please, state only those for which you have a medical diagnosis only] **V3020**

YES 1
NO 2

F2 Do you have any disability, such as limited mobility, blindness, deafness or any other disability? **V3030**

YES 1
NO 2 (*go to question F.5*)

If YES to questions F1 or F2

F3 Given your health problems, in order to do the usual things that you would easily do if you did not have such problems, do you need any help from other people in your daily life, either at home or outside? **V3040**

NO	1
YES , occasionally under certain circumstances	2
YES, always. I need help to do basic things such as shopping, going to the bank or to the post office	3

IF YES to question F3 **V3050**

F4 Who does usually provide such help?

Relatives or household members living with you	1
Relatives not living with you	2
Friends, colleagues, neighbors	3
Voluntary people (not for pay)	4
Medical staff employed by local health unit, municipality, hospitals or any other public body	5
Any other staff employed by local health unit, municipality, hospitals or any other public body	6
Medical staff paid by yourself or your family	7
Any other staff paid by yourself or your family	8

TO ALL

F5 Would you say that your sight is (with glasses or contact lenses) (*read*) **V3060**

Excellent	1
Good	2
Fair	3
Poor	4
Very poor	5

F6 Would you say that your hearing is (without hearing aid) (*read*) **V3070**

Excellent	1
Good	2
Fair	3
Poor	4
Very poor	5

F6.1 Do you use any hearing aid? **V3080**

YES 1
NO 2

IF YES:

F6.2 Would you say that your hearing with a hearing aid is (*read*) **V3085**

Excellent	1
Good	2
Fair	3
Poor	4
Very poor	5

F7 In your spare time, do you exercise or practice any physical activity, even light activities such as walking? **V3090**

YES 1
NO 2

IF YES TO F7:

F7.1 Which one of the following activity do you do in your spare time? **V3100**

Competitive sport or regular training more than once a week	1
Non competitive sport such as swimming, tennis, jogging	2
Occasional non competitive sport as swimming, tennis, jogging	3
Light physical activities (walking at least 1km, cycling, etc.)	4

If he/she works

F8 Does your job or your homework require a very heavy, a bit heavy, or light physical effort?

	Job RP: V3110_1 Spouse: V3110_3	Home work RP: V3110_2 Spouse: V3110_4
Very heavy	1	1
Heavy	2	2
Light	3	3
I don't work (at home/outside)	4	4

If he/she doesn't work

Did your job or your homework require a very heavy, heavy, or light physical effort?

	Job RP: V3120_1 Spouse: V3120_3	Home work RP: V3120_2 Spouse: V3120_4
Very heavy	1	1
Heavy	2	2
Light	3	3
I did not work (at home/outside)	4	4

F9.1 Do you know your height? **V3130** Height Cm |__|__|__|

F9.2 Do you know your weight? **V3150** Weight Kg |__|__|__|

F10 Do you regularly check your health through medical and diagnostic tests or specialist's examinations? **V3170**

YES 1
NO 2

IF YES:

F10.1 How often do you check your health through medical and diagnostic tests or specialist's examinations? **V3180**

More than once a week	1
Once a week	2
Two or three times in a month	3
Once a month	4
Once or twice every three months	5
Once or twice every year	6
Once a year	7
Other	8

F11 In which health facilities do you usually do your check ups? **(One answer only) V3190**

Private facilities, operating within the local health service	1
Private facilities not operating within the local health service	2
Public health facilities (local health service, hospital, etc.)	3
Blood donation center	4
Other	5

F.11.1 Do you use these facilities because they are the best ones, or because you cannot go elsewhere? **(One answer only) V3200**

I prefer these facilities because they are better than other ones	1
I prefer these facilities because they are cheaper than other ones	2
I prefer these facilities because the waiting list is not very long	3
I am forced to go there, I cannot go elsewhere	4
Other	5

F12 How long do you usually have to wait between the booking and the access day to do your medical tests?

Number of days: **V3210**

F13.1 Do you regularly (or occasionally) drive? **V3220**

YES 1
NO 2

IF YES to questions 13.2 and 13.3

F13.2 Do you fasten your seatbelt when you drive in your town? **V3230**

Always	1
Almost always	2
Sometimes	3
Rarely	4
Never	

F13.3 Do you fasten your seatbelts when you drive on main roads or motorways? **V3240**

Always	1
Almost always	2
Sometimes	3
Rarely	4
Never	

F14 Do you smoke? **V3250**

(If NO) Did you smoke in the past? Have you ever smoke?

(If YES) Do you smoke cigarettes, cigars, pipe?

NO, I never smoked	1
NO, I don't smoke at the moment, but I used to	2
YES, I smoke cigarettes	3
YES, I smoke cigars or pipe	4

F15 For how long did you smoke? Do not consider eventual periods when you quit

Number of years: **V3260**

(If you smoke, or used to, cigarettes mostly)

F16 How many cigarettes do you usually (or did you use to) smoke?

Number of cigarettes per day **V3270**

(If used to smoke)

F17 How long did you stop smoking?

Years	RP: V3280_1 Spouse: V3280_3
Months	RP: V3280_2 Spouse: V3280_4

F18 Do you drink any alcohol, such as wine or beer? **V3290**

Never	1
Hardly ever	2
I drink occasionally, between meals	3
I drink occasionally, on meals	4
I drink every day, but on meals only	5
I always drink on meals and sometimes between meals	6
I always drink on and between meals	7
Other	8

F18.1 Do you drink strong drinks, such as whisky, grappa, etc.? **V3290**

Never	1
Occasionally only	2
I regularly drink them (almost daily)	3
Other	4

Public health care

Interviewer: show chart F19

During 2000, did you use any of the following health public services?

IF YES

During 2000, how much did you spend in total for these services? Include tickets, if any.

	Use (YES=1, NO=2)	Amount Italian lire
F19A. Hospitals and public health services for surgery, medical treatments, plastering, etc. IF YES: How much did you spend?	V3400	V3410
F19A1. Number of operations (surgery or non-surgery)	V3420	
F19A2. Number of days spent in public hospital	V3430	
F19B. Blood tests and other laboratories exams (public bodies only). IF YES: How much did you spend?	V3440	V3450
F19B1. Number of check ups (how many checkups did you have?)	V3460	
Number of specialist and general examinations, i.e		
F19C1. Dentist	RP: V3470_1 SPOUSE: V3470_6	
F19C2. Oculist or Optician	RP: V3470_2 SPOUSE: V3470_7	
F19C3. Other specialist's examinations	RP: V3470_3 SPOUSE: V3470_8	
F19C4. Other general examinations	RP: V3470_4 SPOUSE: V3470_9	
IF YES to F19C: How much did you spend in total for specialist and general examinations,?		RP: V3470_5 SPOUSE: V3470_10
F19D. Have you been in a nursing home? (public facilities only). IF YES: How much did you spend?	V3500	V3510

Private health care

Interviewer: show chart F20 to the interviewee

Did you use any of the following private health facilities (even operating within the public health system), during the last year?

IF YES:

How much did you spend in total for these facilities, in 2000?

	Use (YES=1, NO=2)	Amount Italian lire
F20A. Private hospitals (even operating within the public health system) to have surgery, medical treatments, plastering, etc IF YES: How much did you spend?	V3600	V3610
F20A1. Number of operations (surgery or non-surgery)	V3620	
F20A2. Number of days spent in private hospital	V3630	
F20B. Blood tests and other laboratories exams (private facilities only). IF YES: How much did you spend?	V3640	V3650
F20B1. Number of check ups (how many checkups did you have?)	V3660	
Number of specialist and general examinations, that is		
F20C1. Dentist	RP: V3670_1 SPOUSE: V3670_6	
F20C2. Oculist or Optician	RP: V3670_2 SPOUSE: V3670_7	
F20C3. Other specialist's examinations	RP: V3670_3 SPOUSE: V3670_8	
F20C4. Other general examinations	RP: V3670_4 SPOUSE: V3670_9	
IF YES to F20C: How much did you spend in total for specialist and general examinations in private facilities?		RP: V3670_5 SPOUSE: V3670_10
F20D. Have you been in a nursing home? (private facilities, even operating within the public health system). IF YES: How much did you spend?	V3700	V3710

	(YES=1, NO=2)	Amount Italian lire
F21 In 2000, did you buy any medicines? <i>IF YES:</i> How much did you spend? Consider any prescription charge	V3480	V3490

F22 Do you have any private health insurance (accidents and sickness)? V3800

YES 1
NO 2

IF YES to F22

F23 Have your health expenses been fully or partly covered by your insurance? V3810

Fully covered	1
Mostly (half, at least)	2
Only partly (less than half)	3
Not at all	4
I have not spent any money for health care (neither private nor public)	5

IF YES to F22

F24 Have your health expenses been fully or partly paid by your children, relatives or friends? V3820

Fully covered	1
Mostly (half, at least)	2
Only partly (less than half)	3
Not at all	4
I have not spent any money for health care (neither private nor public)	5

TO ALL

F25 If you needed help because of a serious illness, do you have any friend or relative who would be willing and able to assist you over a long time? V3830

YES 1
NO 2

IF YES to F25:

F26 It would be V3840

Children, daughter/son-in-law	1
Grandchildren	2
Relatives	3
Other	4

Section G - HEA LTH AND WORK

Questions G1-G20 are asked to the reference person (household member #1) and to the spouse (if present)

	Reference person responds in person	Spouse responds in person YES=1, NO=2
Member number <u>_1</u> and <u>_2</u> except where noted otherwise	YES	V4010_ <u>2</u>

G1 Do you have any health problems, which affects (or affected before you retired) your work activities? For instance, can you lift heavy things? Can you drive without any difficulties? etc. **V4020**

YES 1
NO 2 **go to question G8**

IF YES:

G2 How do your health problems affect (or did affect) your work? **V4030**

It is a chronic illness?	1
Disability	2
Other	3

If "disability" or "other" to question G2:

G3 Do you think you can recover from your illness? May your impairments get over (in less than three months time)? Will it take a longer time? **V4040**

YES, it is a transitory illness 1
NO, it is a permanent illness 2

If "disability" or "other" to question G2

G4 Have you had these health troubles before? **V4050**

YES 1
NO 2

If "disability" or "other" to question G2

G5 When did you first have these health troubles (*read*) **V4060**

I have always been affected by these health troubles. All my life long	1
Before I started working	2
After I started working	3
After I retired	4

G6 Are your health troubles (impairment) directly related to your present or past job? **V4070**

YES 1
NO 2

If you work:

G7 Do you think that your health may get better and will no longer affect your job? **V4080**

YES 1
NO 2

TO ALL

G8 Have you ever had any work accidents that forced you to stay at home, to work fewer hours, to change your job? **V4090**

YES 1
NO 2

If you work:

G9 Did you have any work accident for which you needed medical treatment and which affected your job, over last year? **V4100**

YES 1
NO 2

If you work:

G10 Considering your health status, can you work full time (35-40 hours a week, at least)? Can you work part-time? Can you work on occasional basis, only? Do you think you cannot work at all? Do not consider your present working hours but those you would be able to do, given your health conditions. **V4110**

Full-time	1
Part-time	2
Job on occasional basis	3
I cannot work at all	4

If you work or you are retired

G.11.1 In the last years, did you have to work fewer hours or to stop working (before you retired) because your health troubles? **V4120**

YES 1
NO 2

Go to question G15

IF YES:

G11 When your health status went worse, did anybody from your family (partner, children, other relatives) begin working, stop working, change his/her working hours because of your health conditions? **V4130**

YES 1
NO 2

IF YES:

G12 Can you say what did the husband/wife do? **RP: V4140_1 SPOUSE: V4140_4**

Started working	1
Worked more hours	2
Stopped working	3
Worked less hours	4
None of the above	8
I don't have a husband/wife	9

G12 Can you say what did the children do? **RP: V4140_2 SPOUSE: V4140_5**

Started working	1
Worked more hours	2
Stopped working	3
Worked less hours	4
None of the above	8
I don't have children	9

G12 Can you say what did the other relatives do? **RP: V4140_3 SPOUSE: V4140_6**

Started working	1
Worked more hours	2
Stopped working	3
Worked less hours	4
None of the above	8
I don't have other relatives	9

IF YES to question G11.1

G13 Let's talk about your household income after your health problems turned up. Would you say that your household income is **(read) V4150**

Decreased 1
Same as before 2
Increased 3

IF YES to question G11.1

G14 Did you have to use your personal savings to take care of your health? **V4160**

YES 1
NO 2
I have no savings at all 3

TO ALL

G15 Did you apply for disability benefits? **V4170**

YES 1
NO 2

IF YES:

G16 Was your application accepted? **V4180**

YES 1
NO 2

Let's now see if your household members or other relatives' health affects your work.

G17 Do you provide any unpaid nursing to chronically ill or disabled people? **V4200**

YES 1
NO 2

Go to question H1

IF YES:

G18 Which is your relationship between these people and yourself? **V4210**

Wife/Husband 1
Parent/s 2
Child/children 3
Any other relative 4
Non relatives 5

G19 Does the person you take care of live with your household? One person or more than one? **V4220**

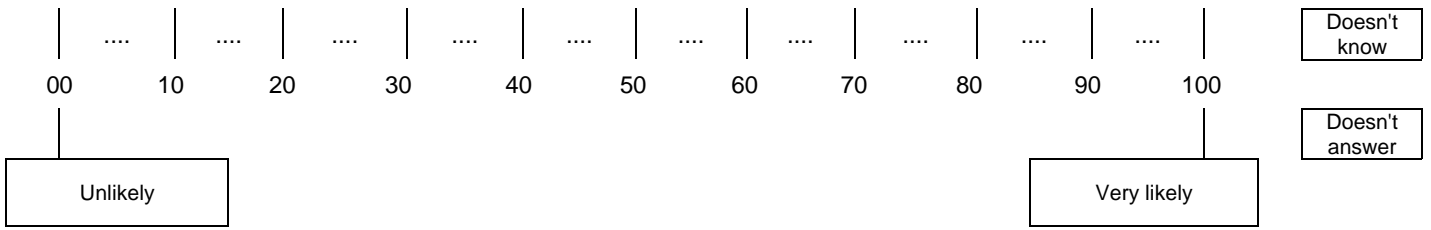
YES 1
YES, more than one 2
NO 3

Interviewer: Show chart G20 to the interviewee

G20 Let's now consider how your voluntary (unpaid) nursing affects your job. How did your working status (and working hours) change since you started this voluntary activity? **V4230**

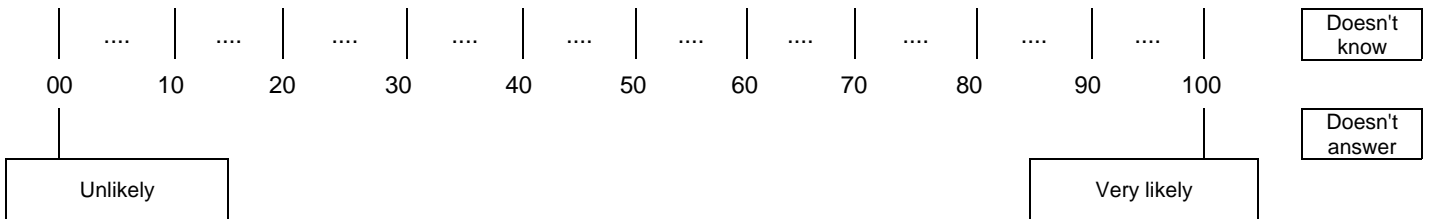
I don't work any more, but I used to	1
I work less hours than earlier	2
I work as many hours as I used to	3
I work more hours than earlier	4
I started working	
I have never worked	
I have always provided unpaid nursing	

H5 How likely is that you or your husband/wife will receive financial support (ten million lire, at least, or more) from a child, relative or friend over the next 10 years? **V5060**



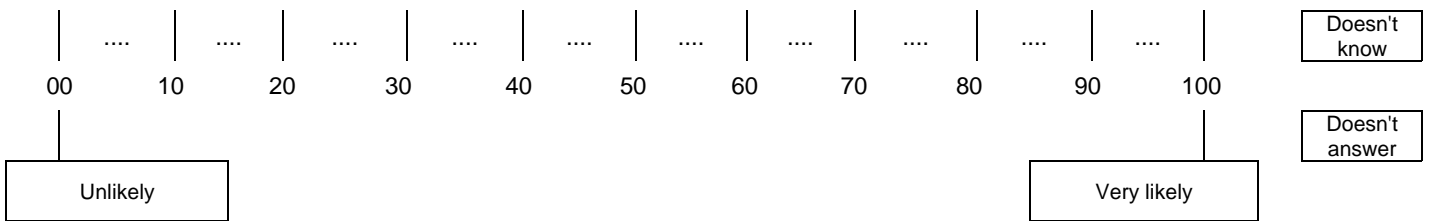
If younger than 60

H6 Let' think about your work (not only your present one). How likely is that you will be working beyond the age of 60? **V5070**



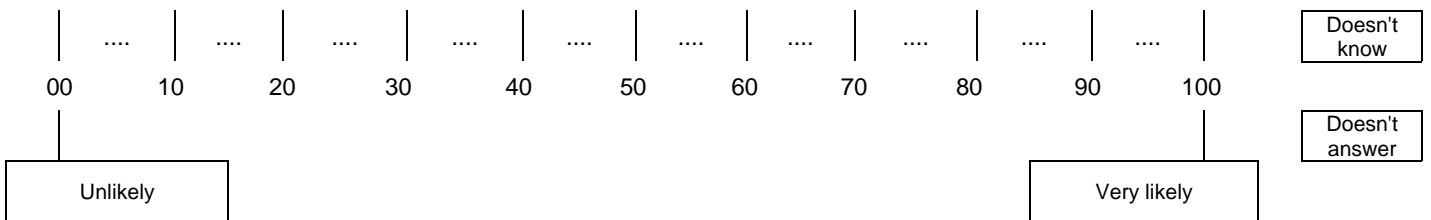
If younger than 60

H7 Let' think about your work (not only your present one). How likely is that your health may affect your work over the next ten years? **V5080**



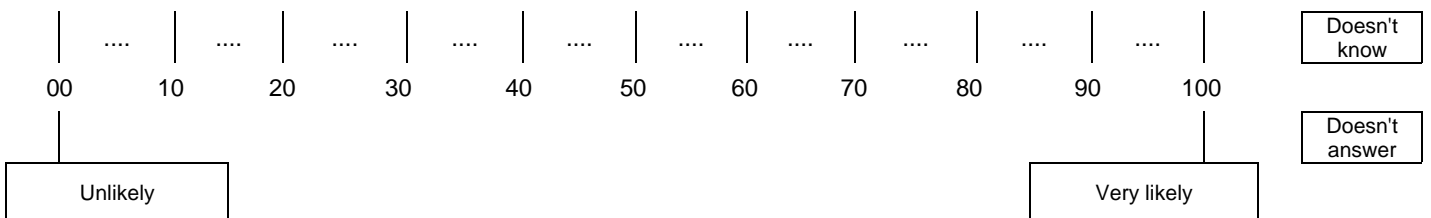
If younger than 66

H8 How likely is that you will be living beyond the age of 75? **V5090**



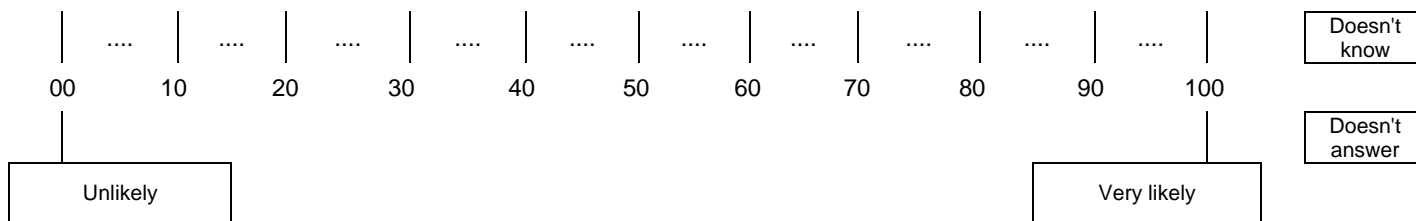
If working at the present time

H9 How likely is that the Government will reduce the pension you are entitled to, over the next 10 years? **V5100**



If working at the present time

H10 How likely is that the Government will increase the retirement age you are entitled to, over the next 10 years? **V5110**



H11 In deciding about saving or spending money, people often think about the future. When you decide how much to save and how much to spend, which of the following time periods is more important to you (and to your husband/wife) **V5120**

The next few months	1
The next year	2
The next two or three years	3
The next 5-10 years	4
More than 10 years	5
The entire life	6

Section A – FINAL INTERVIEWER'S NOTES

A6 Would the interviewee be available for a further interview? **V6070**

YES 1
NO 2

IF YES to question A6

A7 Should we need to contact you again, who could we refer to if you were away?

Name _____

Surname _____

Address _____

Tel. no _____ / _____

Interview evaluation	Score: 1 (minimum) to 10 (maximum)
A8 How do you rate the interviewee's understanding of the questions?	V6060_1
A9 How do you rate the interviewee's interest about the questionnaire topics?	V6060_2
A10 How do you rate the interviewee's interest about the health topics?	V6060_3
A11 How do you rate the reliability of the information provided by the interviewee on income?	V6060_4
A12 How do you rate the reliability of the information provided by the interviewee on income?	V6060_5

Interview ending time _____

Duration of the interview _____ minutes

CODES FOR PROVINCE, REGION, AND CITY SIZE

<i>Population of the city of residence (as of 31-12-1999)</i>	<i>dimcom</i>
Less than 5,000	1
5,000-10,000	2
10,000-20,000	3
20,000-40,000	4
40,000-100,000	5
100,000-500,000	6
> 500,000	7

<i>Geographical Area</i>	<i>Area5</i>
North-West	1
North-East	2
Centre	3
South	4
Islands	5

A5. ISTAT CODE FOR REGION OF RESIDENCE (*V6050*) AND REGION OF BIRTH (*RegNasc*)

1:Piemonte
 2:Valle d'Aosta
 3:Lombardia
 4:Trentino Alto Adige
 5:Veneto
 6:Friuli Venezia Giulia
 7:Liguria
 8:Emilia Romagna
 9:Toscana
 10:Umbria
 11:Marche
 12:Lazio
 13:Abruzzo
 14:Molise
 15:Campania
 16:Puglia
 17:Basilicata
 18:Calabria
 19:Sicilia
 20:Sardegna
 99:Foreign country

B5. ISTAT CODE FOR PROVINCE OF RESIDENCE (ProvRes)

1:TORINO
2:VERCELLI
3:NOVARA
4:CUNEO
5:ASTI
6:ALESSANDRIA
7:AOSTA
8:IMPERIA
9:SAVONA
10:GENOVA
11:LA SPEZIA
12:VARESE
13:COMO
14:SONDRIO
15:MILANO
16:BERGAMO
17:BRESCIA
18:PAVIA
19:CREMONA
20:MANTOVA
21:BOLZANO
22:TRENTO
23:VERONA
24:VICENZA
25:BELLUNO
26:TREVISO
27:VENEZIA
28:PADOVA
29:ROVIGO
30:UDINE
31:GORIZIA
32:TRIESTE
93:PORDENONE
33:PIACENZA
34:PARMA
35:REGGIO EMILIA
36:MODENA
37:BOLOGNA
38:FERRARA
39:RAVENNA
40:FORLI " " "
41:PESARO
42:ANCONA
43:MACERATA
44:ASCOLI PICENO
45:MASSA
46:LUCCA
47:PISTOIA
48:FIRENZE
49:LIVORNO
50:PISA

51:AREZZO
52:SIENA
53:GROSSETO
54:PERUGIA
55:TERNI
56:VITERBO
57:RIETI
58:ROMA
59:LATINA
60:FROSINONE
61:CASERTA
62:BENEVENTO
63:NAPOLI
64:AVELLINO
65:SALERNO
66:L " ' "AQUILA
67:TERAMO
68:PESCARA
69:CHIETI
70:CAMPOBASSO
94:ISERNIA
71:FOGGIA
72:BARI
73:TARANTO
74:BRINDISI
75:LECCE
76:POTENZA
77:MATERA
78:COSENZA
79:CATANZARO
80:REGGIO CALABRIA
81:TRAPANI
82:PALERMO
83:MESSINA
84:AGRIGENTO
85:CALTANISSETTA
86:ENNA
87:CATANIA
88:RAGUSA
89:SIRACUSA
90:SASSARI
91:NUORO
92:CAGLIARI
95:ORISTANO
96:BIELLA
97:LECCO
98:LODI
99:RIMINI
100:PRATO
101:CROTONE
102:VIBO VALENTIA
103:VERBANIA