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for Work &
Pensions



Government
Social Research

Technical Report

Move to Universal Credit DWP Legacy Benefit Customer
Qualitative Research

July 2025

DWP research report no.1104

A report of research carried out by Ipsos on behalf of the Department for Work and Pensions.

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1. Technical Report

This report provides the technical and methodological details of research commissioned by the Department for Work and Pensions (DWP) to understand the experiences of legacy benefit customers who received a Migration Notice inviting them to move to Universal Credit (UC). This report provides detail on the research methodology, including sampling, recruitment and fieldwork. Copies of the research materials are appended.

1.1 Background and context

Universal Credit (UC) is a means-tested benefit that was introduced in the UK to replace six 'legacy' benefits: Income-related Employment and Support Allowance (ESA), Income-based Jobseeker's Allowance (JSA), Housing Benefit (HB), Income Support (IS), Working Tax Credit (WTC), and Child Tax Credit (CTC). By 2018, all new customers were required to apply for UC, while existing legacy benefit customers continued receiving their awards.

The Department for Work and Pensions' (DWP) strategy for moving these remaining households to UC was set out in the department's Completing the Move to UC policy document, published in April 2022¹.

These households have been invited to move to UC in different phases depending on the legacy benefits they were claiming. Several Discovery stages were conducted to understand how the transition to UC worked in practice for different customer groups and to inform future transitions.

Following initial Discovery work with customers invited to move to UC in May 2022, the DWP concentrated on understanding the experiences of the move for households on WTC and CTC, with research published in December 2024.

In September 2023, the DWP conducted additional Discovery work, inviting a small number of households claiming income-related ESA with CTC, income-based JSA, HB, and IS in Harrow, Manchester and Northumbria to move to UC. The first phase of this research focuses on the experiences of this cohort of former legacy benefit customers.

The DWP began inviting households who were claiming IS to move to UC at scale from April 2024, and HB only from July 2024. The DWP also started inviting a small number of households receiving only income-related ESA or income-related ESA with HB in June 2024, in preparation for future transitions. The second phase of this

¹ [Completing the move to Universal Credit - GOV.UK](#)

research focuses on these specific legacy benefit cohorts who were moved onto UC from April 2024 onwards.

1.2 Research aims

The DWP commissioned Ipsos UK to conduct qualitative research to explore participants' experiences of transitioning from specific legacy benefits to UC.

The research aimed to provide a deeper understanding of the legacy benefit customer journey, from the point of being notified of their move to UC through to either making a claim or deciding not to claim.

Both phases of the research aimed to give insight into:

- Legacy benefit customers' knowledge, awareness and understanding of UC and their attitudes towards it, prior to receiving the Migration Notice
- Customer experience from receiving a Migration Notice onwards, either through making a claim or deciding not to claim
- Why customers decide to make a claim for UC or why they decide not to
- Any barriers to customers successfully making a claim for UC and how these can be addressed through improvements to the process or support offered
- Early customer experiences of the migration process and what further support they may need from the DWP to successfully make a claim for UC

1.3 Research methodology

A qualitative research approach ensured an in-depth understanding of the customer experience. It highlighted the intricacies of the Move to UC process and identified specific areas for additional support which measures could be tailored to. This qualitative research did not aim to be representative of the wider population but to instead provide in-depth insight relating to the experiences of the range of customers who participated.

The research was conducted in two phases. Fieldwork for the first phase of the research was paused during the pre-election period from May to July 2024. A decision was made to conduct a second phase of the research and focus on a wider group of benefit cohorts, who had since been invited to move to UC.

In both phases:

- Interviews were conducted with single participants and participants in a couple to see if there were any experiences specific to single or couple claims.
- Customers had received their UC Migration Notice a minimum of three months prior to recruitment for research interviews.

Phase 1:

- It focused on legacy benefit customers in the three pilot locations (Harrow, Manchester and Northumbria) who had been sent a Migration Notice.

- It also focused on specific benefit groups (income-based JSA, IS, HB, and income-related ESA with HB or CTC).
- All participants were UC customers at the time of the interview.

Phase 2:

- It followed a broader roll-out of the migration to UC (IS and HB only customers) and those invited as part of the small-scale Discovery work in June 2024 (ESA with HB or ESA only).
- It focused on specific benefit groups (IS, HB only, ESA only and ESA with HB customers).
- Aimed to recruit customers who had not made a UC claim by the time of the interview alongside those who had made a claim for UC

1.4 Sampling

In both phases, DWP provided a sample of single and couple legacy benefit customers who had received a Migration Notice.

The sample fields included:

- Contact details: Name, address, telephone number
- Demographic details: Age band, sex
- Details about legacy benefits:
 - Phase 1: In receipt of Jobseekers Allowance (JSA), Income Support (IS), Housing Benefit (HB) or Employment Support Allowance (ESA) and Housing Benefit or Child Tax Credit (CTC).
 - Phase 2: Income Support – any combination, Housing Benefit only, Employment Support Allowance only or Employment Support Allowance with Housing Benefit)
- Details about their claim for UC: Deadline on the Migration Notice, date of UC claim, length of claim.
- Number of contacts supplied in the sample is detailed for each phase below. In the September 2023 Discovery phase, Migration Notices were sent out to single legacy benefit customers first and couples were invited to move after all the single customers had been invited, so in phase 1, the couples' sample was delivered later. For phase 2, Migration Notices had been sent to singles and couples at the same time, so the sample contained both.
 - Phase 1: 1,000 contacts in the singles sample, 500 in the couples sample.
 - Phase 2: 2 x 1,000 contacts in the combined singles and couples sample

1.5 Recruitment quotas

In both phases, minimum and monitoring quotas were set to ensure a good mix of representation in the achieved sample while maintaining recruitment feasibility. In both phases, customers had received their Migration Notice a minimum of three months prior to recruitment for research interviews. Recruiting non-claimants was challenging because, at the time of recruitment, most legacy benefit customers who were flagged in the sample as non-claimants typically had since gone on to make their UC claim.

Phase 1

There were hard quotas to ensure a mix of type of legacy benefit claimed. There were soft quotas on demographic information such as gender, age and employment status. Table 2 shows the quotas for different characteristics and the achieved number of interviews in the final sample for phase 1.

Table 2: Phase 1 recruitment quotas and achieved interviews

Description		Singles Quota	Singles Achieved	Couples Quota	Couples Achieved
Primary quotas					
Legacy Benefit Claimed	Jobseekers Allowance	6	6	3	0
	Income Support	12	12	6	2
	Housing Benefit	12	12	6	5
	Employment Support Allowance + Housing Benefit / Child Tax Credit	12	12	6	1
Area	Harrow	14	9	10	3
	Manchester	14	25	10	3
	Northumbria	14	8	10	2
Secondary quotas					
Gender	Male	Mix and monitor	13	Mix and monitor	*
	Female		29		
Age	25-44		11		
	45-54		17		
	55+		14		
Employment Status	Unemployed		34		
	Carer		6		
	Employed		2		
UC Claim Status	Made claim and received first payment		41		

	Made claim and not received first payment		1		
Made UC Claim	Before the migration deadline		41		
	After the migration deadline		1		
	Total		42		8

All respondents in the phase 1 research were UC claimants at the time of the interview.

*Couples secondary quota information is unavailable where fieldwork was paused due to the pre-election period and was later deleted to comply with GDPR privacy rules relating to the storage and retention of data.

Phase 2

There were hard quotas to ensure a mix of type of legacy benefit claimed, UC claim status and region. There were soft quotas on demographic information such as gender, age and employment status and UC information including length and mode of claim. New quotas were introduced to phase 2 including whether a customer had received additional support with their claim as part of the enhanced support journey which was not available during phase 1. The enhanced support journey is a non-linear UC claim support process provided by DWP for IS, and income-related ESA customers who have not made a claim for UC 11 weeks after receiving their Migration Notice. The enhanced support journey starts in week 12, before the deadline date. It involves different interventions ranging from outbound calls, system checks, home visits and contact with support organisations in the local community.

Table 3 shows the quotas set for different characteristics and the achieved number of interviews in the final sample for phase 2.

Table 3: Phase 2 recruitment quotas and achieved interviews

Description		Singles Quota	Singles Achieved		Couples Quota	Couples Achieved
Primary quotas						
Legacy Benefit Claimed	Income Support – any combination	Min 12	11		Min 12	11
	Housing Benefit only	Min 12	16		Min 12	11
	ESA500 (Employment Support Allowance only or ESA & HB)	Min 12	14		Min 12	12
Region	England	Min 12	34		Min 12	28
	Wales	Min 3	2		Min 3	4
	Scotland	Min 3	5		Min 3	2
UC Claim Status	UC Claimant	Min 25	32		Min 25	29
	UC Non-claimant	Min 5	9		Min 5	5

Additional Support Received with UC claim	Yes	Min 4	4		Min 3	3
Secondary quotas						
Mode of UC Claim*	Telephone	Mix and monitor	8		Mix and monitor	12
	Online		25			20
Gender	Female		25			17
	Male		16			17
Age	18 – 24		4			0
	25 – 34		7			4
	35 – 44		9			2
	45 – 54		14			7
	55+		7			21
Length of UC Claim	Claimed and received several payments		24			24
	Claimed and received first payment		3			4
	Claimed but haven't received first payment		5			1
Presence of children	No children		30			14
	Pre-school aged children (aged up to and including 4)		2			3
	Primary school aged children (aged up to and including 11)		3			2
	Children aged 11-18		4			4
	Children 18+		2			11
Total			41			34

*Non-claimants in this research included participants who had started a UC claim but not completed it. For these participants, despite no longer claiming UC, the mode they used to make their claim was recorded.

1.6 Fieldwork preparation and recruitment

1.6.1 Advance communication to participants

In both phases, all cases in the sample frame were sent an advance letter providing information about the research and the opportunity to opt out of further contact by calling or emailing the supplied project contact details. The letter informed participants that Ipsos was carrying out research on behalf of DWP to understand the

experiences of customers who had been asked to move to Universal Credit. The letter said that if they wanted to take part, they would be contacted by recruiters to schedule an interview to take place at a convenient time via telephone or (for couples) face-to-face. The letter also included links to DWP's and Ipsos' privacy policies and provided contact details for Ipsos and DWP so participants could ask any questions about the research.

Participants were given six days to opt out of the research before being contacted by recruiters. There were 29 opt outs in Phase 1 and 35 in Phase 2. Copies of the advance letters can be found in section 2.1 of the Appendix.

1.6.2 Recruitment

Phase 1 singles recruitment took place between 19 February 2024 and 10 April 2024. Phase 1 couples recruitment started on the 1 May 2024 and was paused on 24 May 2024 due to the pre-election sensitivity period. Phase 2 recruitment took place between 6 November 2024 and 28 February 2025.

In both phases, recruitment was conducted by Paton Williamson Consultancy on behalf of Ipsos. Individuals from the sample (excluding those who had opted out of the research) were called and asked if they would like to take part in a 60-minute (Phase 1) or 45-minute (Phase 2) interview, and if in agreement, they were screened and scheduled for an interview with an Ipsos moderator. Participants were offered a £40 (Phase 1) or a £30 (Phase 2) online shopping voucher as a thank you for taking part. In both phases, couples who participated in face-to-face interviews received two vouchers; one for each partner.

1.7 Research materials and fieldwork

1.7.1 Research materials

Research materials were developed by Ipsos and signed off by DWP ahead of the fieldwork period. These materials included:

- Advance letter (Appendix 2.1) to invite customers to participate in the research and provide the opportunity for customers to opt out of further contact
- Recruitment screener (Appendix 2.2) used to screen participants and to monitor and achieve quotas
- Interview discussion guide (Appendix 2.3)
- Follow-up support leaflet (Appendix 2.4)

The discussion guide (Appendix 2.3) covered topics including legacy benefit customers reactions to and understanding of the Migration Notice they received from DWP, the barriers they faced to claiming within the deadline, how they found the process of claiming UC and the impacts of moving to UC. Participants were also asked if they had any specific feedback for DWP on how they could have been

supported to claim sooner and ways that DWP could support them to manage their claim going forward.

The follow-up support leaflets (Appendix 2.4) were distributed to participants after their interviews and included details about the research they had participated in, a link to the privacy policy, and contact details for further support in case the topics explored in the interviews prompted participants to need further support. The selected support organisations covered help with benefits, personal finances, relationships and health issues or disabilities.

1.7.2 Fieldwork

Phase 1:

Between the 19 February 2024 and 5 April 2024 a total of 42 telephone interviews were completed with singles and between 16 May and 21 May 2024 a total of 8 interviews were conducted with couples (3 telephone and 5 face-to-face).

Phase 2:

Between 18th November 2024 and 4th March 2025, a total of 75 interviews were conducted (69 telephone interviews and 6 face-to-face interviews).

1.8 Analysis and deliverables

Interviews were recorded (audio only) for note-taking purposes. Following the interviews, moderators summarised the key points from the raw interview data into an analysis grid which grouped the data by interview question and key areas of enquiry. Moderators also added verbatim quotes from interviews which illustrated key points and summarised participants' particular viewpoints.

For both research phases, analysis sessions were conducted with all interview moderators as well as members of the DWP team to hear the emerging findings and add context. The purpose of the analysis sessions were to reach a consensus on the salient points across all interviews, explore differences in experiences by different participant characteristics, and identify illustrative case studies. The notes from these sessions, combined with data from the analysis grids, were used to inform the next stage of thematic analysis which included refining themes, testing findings, and supporting analysis with verbatim quotes.

The output from the final analysis stage in both phases was summarised in separate PowerPoint presentations. These PowerPoints were shared with DWP ahead of presentations to the DWP research team and wider colleagues on 23 April 2024 (Phase 1) and 27 March 2025 (Phase 2). The PowerPoints were then revised, incorporating feedback from stakeholders, finalised, and submitted as final on 30 April 2024 (Phase 1) and 27 March 2025 (Phase 2)

A written report incorporating findings from Phase 1 and Phase 2 was first delivered to DWP colleagues on 1 April 2025. After multiple rounds of feedback including a

review by wider DWP colleagues, the written report was submitted as final in July 2025.

1.9 Interpretation of findings

Qualitative research approaches are used to shed light on why people hold particular views, or have particular experiences, rather than how many people have those views or experiences. These approaches are used to explore the nuances and diversity of experiences and the factors which shape or underlie them. The results are intended to be illustrative and explanatory, rather than statistically reliable. Customers were sampled from a range of characteristics, situations and experiences and the findings are not intended to be statistically representative of the wider customer population.

It is not always possible in qualitative research to provide a precise or useful indication of the prevalence of a certain outcome or experience, due to the relatively small number of participants generally involved and because the sample is not intended to be statistically representative of the wider population. The findings reported in the presentation and written report represent common themes that emerged across multiple interviews.

Sometimes, ideas can be mentioned a number of times in a discussion, and yet hide the true drivers of experience; or a minority view can, in analysis, turn out to express an important emergent view or trend. The value of qualitative work is to identify the issues which bear future investigation. In reporting the qualitative findings, the focus is on exploring the breadth of experiences, and identifying the main themes, rather than the number of people who have expressed that thought. Any proportions used in qualitative reporting, such as “some” or “many”, should always be considered indicative, rather than exact.

Where examples are used such as an insight or quote from one customer, this is typically to illustrate findings that emerged more broadly across multiple interviews.

2 Appendix

2.1.1 Advance letter – Singles Phase 1

SUBJECT: Research to understand your experience of claiming benefits

Your reference: [ID]

Dear [NAME],

We are writing to ask for your help with an important piece of research that Ipsos is carrying out for the Department for Work and Pensions (DWP). You have been contacted to take part in this research because DWP's records show that they have written to you about moving from [legacy_benefits] to Universal Credit. We are interested in speaking with you whether or not you have claimed Universal Credit.

The research is about how DWP communicates with its customers and people's experience of being asked to move to Universal Credit. It will provide DWP with important information about how they can improve people's experiences of their services.

What will taking part involve?

If you want to take part, a researcher will interview you over the telephone and it will take around 45-60 minutes. The interview will take place between the 4th March and the 10th April on a day and time that is convenient for you. We will give you a £40 shopping voucher as a thank you for taking part.

The interviews will be confidential and used for research purposes only. You can read DWP's privacy policy at <https://www.gov.uk/government/organisations/department-for-work-pensions/about/personal-information-charter>, and Ipsos's privacy policy at: <https://assets-uk.ipsos.com/pa/dwp/m2uc/privacy.pdf>

Do I have to take part?

You do not have to take part. It is up to you. No-one including DWP or your local authority will know who has taken part in the research. Whether or not you choose to take part, **it will not affect any benefits or tax credits you claim now or in the future**, or your interaction with DWP, Jobcentre Plus or HMRC.

What do I need to do?

If you do not want to be contacted about this research, please let Ipsos know by emailing UK-PA-DWP-claimingbenefits@ipsos.com, or by calling 0800 0149452 (free) to leave a message, and we will not contact you again.

To take part, please contact Ipsos either by emailing the same address and include your contact details or by calling 0800 0149452 (free) to leave a message. A member of the Ipsos team will call you back.

If you do not tell us you do not want to be contacted, Ipsos will pass your details on to our recruitment partner PWL who will be setting up the interview appointments. PWL may call you in the next few weeks to see if you would like to take part. The call will come from the telephone number 020 7431 4399. If PWL call you, you can still choose not to take part and you can decide this at any time.

If you have any questions about the project, you can contact Ipsos on UK-PA-DWP-claimingbenefits@ipsos.com or call Sally at Ipsos on 020 3059 5000. Alternatively, you can contact Katherine Hicks at DWP on UC.research@dwp.gov.uk to check the research is genuine.

We hope you will take part in this important research to help improve people's experience of receiving services from DWP.

Thank you in advance for your help.

Yours sincerely,

Signature

2.1.2 Advance letter – Couples Phase 1

SUBJECT: Research to understand your experience of claiming benefits as a couple

Your reference: [ID]

Dear [NAME],

We are writing to ask for your help with an important piece of research that Ipsos is carrying out for the Department for Work and Pensions (DWP). You have been contacted to take part in this research because DWP's records show that they have written to you about moving from [legacy_benefits] to Universal Credit. We are interested in speaking with you whether or not you have claimed Universal Credit.

The research is about how DWP communicates with its customers and people's experience of being asked to move to Universal Credit. It will provide DWP with important information about how they can improve people's experiences of their services.

We have also sent a copy of this letter to your partner (where we have their information). We are writing to you both so that you both have the same chance to read this information and decide if you want to take part.

What will taking part involve?

If you and your partner agree that you want to take part, you can take part in one of two ways, depending on where you live and what you are comfortable with:

- 1. Over the telephone:** A researcher will interview **one of you over the telephone** and it will take around 45-60 minutes. The interview will take place between the 10th and the 28th June on a day and time that is convenient for you. We will give the partner who we speak to a £40 shopping voucher as a thank you for taking part.
- 2. In person:** A researcher will interview you **both of you in person** in your home and it will take around 45-60 minutes. The interview will take place between the 10th and the 28th June on a day and time that is convenient for you. We will give you a £40 shopping voucher each as a thank you for taking part.

The interviews will be confidential and used for research purposes only. You can read DWP's privacy policy at <https://www.gov.uk/government/organisations/department-for-work-pensions/about/personal-information-charter>, and Ipsos's privacy policy at: <https://assets-uk.ipsos.com/pa/dwp/m2uc/privacy.pdf>

Do I have to take part?

You do not have to take part. It is up to you. No-one including DWP or your local authority will know who has taken part in the research. Whether or not you choose to take part, **it will not affect any benefits or tax credits you claim now or in the future**, or your interaction with DWP, Jobcentre Plus or HMRC.

What do I need to do?

If you do not want to be contacted about this research, please let Ipsos know by emailing UK-PA-DWP-claimingbenefits@ipsos.com, or by calling 0800 0149452 (free) to leave a message, and we will not contact you again.

To take part, please contact Ipsos either by emailing the same address and include your contact details or by calling 0800 0149452 (free) to leave a message. A member of the Ipsos team will call you back. If you do not tell us you do not want to be contacted, Ipsos will pass your details on to our recruitment partner PWL who will be setting up the interview appointments. PWL may call you in the next few weeks to see if you would like to take part. The call will come from the telephone number 020 7431 4399. If PWL call you, you can still choose not to take part and you can decide this at any time.

If you have any questions about the project, you can contact Ipsos on UK-PA-DWP-claimingbenefits@ipsos.com or call Sally at Ipsos on 020 3059 5000. Alternatively, you can contact Katherine Hicks at DWP on UC.research@dwp.gov.uk to check the research is genuine.

We hope you will take part in this important research to help improve people's experience of receiving services from DWP. Thank you in advance for your help.

Yours sincerely,
Signature

2.1.3 Advance letter – Singles Phase 2

SUBJECT: Research to understand your experience of claiming benefits

Your reference: [ID]

Dear [NAME],

We are writing to ask for your help with an important piece of research that Ipsos is carrying out for the Department for Work and Pensions (DWP). You have been contacted to take part in this research because DWP's records show that they have written to you about moving from [legacy_benefits] to Universal Credit. We are interested in speaking with you, whether or not you have claimed Universal Credit.

The research will look at how DWP communicates with its customers and people's experience of being asked to move to Universal Credit. It will provide DWP with important information about how they can improve people's experiences of their services. We would greatly appreciate your input to this research if you can spare the time.

What will taking part involve?

If you want to take part, a researcher will interview you over the telephone and it will take around 45 minutes. The interview will take place between 6th February and 28th February 2025 on a day and time that is convenient for you. We will give you a £30 shopping voucher as a thank you for taking part.

To take part, please contact Ipsos either by emailing the same address and including your contact details or by calling 0800 0149452 (free) to leave a message. A member of the Ipsos team will call you back.

The interviews will be confidential and used for research purposes only. You can read DWP's privacy policy at <https://www.gov.uk/government/organisations/department-for-work-pensions/about/personal-information-charter>, and Ipsos's privacy policy at: <https://assets-uk.ipsos.com/pa/dwp/m2uc/privacy.pdf>

Do I have to take part?

It's really important that we hear the views and experiences of as many people as possible but taking part is completely voluntary and you do not have to take part. Whether or not you choose to take part, **will not affect any benefits or tax credits you claim now or in the future**, or your interaction with DWP, Jobcentre Plus or HMRC. In addition, your participation in the research will be anonymous and any identifiable information that you provide will not be passed on to anyone, including DWP or any other government department.

If you do not want to be contacted about this research, please let Ipsos know by emailing UK-PA-DWP-claimingbenefits@ipsos.com, or by calling 0800 0149452 (free) to leave a message, and we will not contact you again.

If you do not tell us that you do not want to be contacted, Ipsos will pass your details on to our recruitment partner Paton Williamson Consultancy who will be setting up the interview appointments. PWL may call you in the next few weeks to see if you would like to take part. The call will come from the telephone number 07539 759381. If PWL call you, you can still choose not to take part and you can decide this at any time.

If you have any questions about the project, you can contact Ipsos on UK-PA-DWP-claimingbenefits@ipsos.com or call Sally at Ipsos on 020 3059 5000. Alternatively, you can contact Katherine Hicks at DWP on UC.research@dwp.gov.uk to check the research is genuine.

We hope you will take part in this important research to help improve people's experience of receiving services from DWP.

Thank you in advance for your help.

Yours faithfully,
Signature

2.1.4 Advance letter – Couples Phase 2

SUBJECT: Research to understand your experience of claiming benefits as a couple

Your reference: [ID]

Dear [NAME],

We are writing to ask for your help with an important piece of research that Ipsos is carrying out for the Department for Work and Pensions (DWP). You have been contacted to take part in this research because DWP's records show that they have written to you about moving from [legacy_benefits] to Universal Credit. We are interested in speaking with you, whether or not you have claimed Universal Credit.

The research will look at how DWP communicates with its customers and people's experience of being asked to move to Universal Credit. It will provide DWP with important information about how they can improve people's experiences of their services. We would greatly appreciate your input into this research if you can spare the time.

We have also sent a copy of this letter to your partner (where we have their information). We are writing to you both so that you both have the same chance to read this information and decide if you want to take part.

What will taking part involve?

To take part, please contact Ipsos either by emailing the same address and including

your contact details or by calling 0800 0149452 (free) to leave a message. A member of the Ipsos team will call you back.

The interview will take place between 6th February and 28th February 2025 on a day and time that is convenient for you. We will give the partner who we speak to a £30 shopping voucher as a thank you for taking part.

Your interview will take place over the telephone. A researcher will interview **one of you over the telephone** and it will take around 45 minutes.

The interviews will be confidential and used for research purposes only. You can read DWP's privacy policy at <https://www.gov.uk/government/organisations/department-for-work-pensions/about/personal-information-charter>, and Ipsos's privacy policy at: <https://assets-uk.ipsos.com/pa/dwp/m2uc/privacy.pdf>

Do I have to take part?

It's really important that we hear the views and experiences of as many people as possible but taking part is completely voluntary and you do not have to take part. Whether or not you choose to take part, **will not affect any benefits or tax credits you claim now or in the future**, or your interaction with DWP, Jobcentre Plus or HMRC. In addition, your participation in the research will be anonymous and any identifiable information that you provide will not be passed on to anyone, including DWP or any other government department.

If you do not want to be contacted about this research, please let Ipsos know by emailing UK-PA-DWP-claimingbenefits@ipsos.com, or by calling 0800 0149452 (free) to leave a message, and we will not contact you again.

If you do not tell us that you do not want to be contacted, Ipsos will pass your details on to our recruitment partner Paton Williamson Consultancy who will be setting up the interview appointments. PWL may call you in the next few weeks to see if you would like to take part. The call will come from the telephone number 07539 759381. If PWL call you, you can still choose not to take part and you can decide this at any time.

If you have any questions about the project, you can contact Ipsos on UK-PA-DWP-claimingbenefits@ipsos.com or call Sally at Ipsos on 020 3059 5000. Alternatively, you can contact Katherine Hicks at DWP on UC.research@dwp.gov.uk to check the research is genuine.

We hope you will take part in this important research to help improve people's experience of receiving services from DWP.

Thank you in advance for your help.

Yours faithfully,

Signature

2.2.1 Recruitment screener – Singles Phase 1

Introduction

Good morning / afternoon / evening. Please could I speak to [named contact or appointee if available from sample]?

My name is and I am calling you from PWL Fieldwork, a research agency. We have been commissioned by the research organisation Ipsos to organise some research interviews on behalf of them and the Department for Work and Pensions (DWP). The research is about how DWP communicates with its customers and people's experience of being asked to move to Universal Credit. It will provide DWP with important information about how they can improve people's experiences of claiming Universal Credit. Ipsos also sent a letter about this research which you may have read.

We are contacting you as you should have recently received a letter from DWP regarding moving from [benefit claimed - in sample file] to Universal Credit. We would like to speak to you about this and any actions you may have taken since receiving your letter.

You could be asked to take part in a telephone interview, and we would offer £40 shopping voucher as a "thank you" for your time.

The interview will be conducted within the MRS (Market Research Society) Code of Conduct and General Data Protection Regulation 2018. This means that your responses will remain completely confidential and used for research purposes only. The findings will not identify you and no personal information will be shared with any third parties, including DWP. You can also choose not to answer any questions if you would prefer not to.

Taking part in this research is voluntary and will not affect any benefits or your relationship with DWP and the services you receive either now or in the future.

I just need to ask you a few questions before we confirm the interview and further details about it. Are you happy to proceed?

Screening questions

Q1A

ASK ALL

MULTI CODE

Which, if any, of the following benefits are you currently claiming, or have previously claimed?

- 1 JSA
- 2 Income Support

- 3 Housing Benefit
- 4 Employment Support Allowance
- 5 Child Tax Credit
- 6 Don't know (THANK AND CLOSE)

Q1B

ASK ALL WHO ANSWERED 1-5 AT Q1A. ASK FOR EACH BENEFIT ANSWERED AT Q1A.

MULTI CODE

And how long have you been / were you claiming [BENEFIT AT Q1A] for?

- 1 Less than 2 years
- 2 2 – 4 years
- 3 4 – 6 years
- 4 8 – 10 years
- 5 More than 10 years
- 6 Don't know

Q1C

ASK ALL

SINGLE CODE

Have you received a letter from DWP about moving from [benefit claimed - in sample file] to Universal Credit?

- 1 Yes
- 2 No (THANK AND CLOSE)
- 3 Don't know (THANK AND CLOSE)

Q2A

ASK ALL WHO RECEIVED MIGRATION NOTICE Q1A = 1

SINGLE CODE

Are you claiming Universal Credit?

- 1 Yes – I have claimed and received my first payment
- 2 Yes - I have claimed but haven't received my first payment
- 3 No – I started to make a claim but did not finish the process

- 4 No - I haven't claimed or started to make a claim

Q2B

ASK ALL WHO HAVE CLAIMED UC Q2A = 1 OR 2

SINGLE CODE

When did you make your claim for UC?

- 1 Before the deadline
- 2 After the deadline
- 3 Don't know

Q3

ASK ALL

MULTI CODE

What is your current employment status?

- 1 Full-time employment (30 hours or more a week)
- 2 Part-time employment (less than 30 hours a week)
- 3 Currently not in paid employment
- 4 In full-time education/studying
- 5 Look after the home / children
- 6 Carer
- 7 Retired
- 8 Prefer not to say (CLOSE)

Demographic questions

Q4

ASK ALL

SINGLE CODE

Which of the following describes how you think of yourself?

- 1 Male
- 2 Female
- 3 Non-binary
- 4 Prefer to use my own term
- 5 Prefer not to say

Q5

ASK ALL

How old were you on your last birthday?

NUMERIC

Q6

ASK ALL

Occupation of Chief Income Earner (Probe fully)

OPEN TEXT BOX

Q7

ASK ALL

SINGLE CODE

How would you describe your ethnicity?

- 1 White British / other white (British/ English/ Welsh/ Scottish/ Northern Irish/ Irish/ Any other white background)
- 2 Mixed (White and Black Caribbean/ White and Black African/ White and Asian/ Any other mixed background)
- 3 Asian (Indian/ Pakistani/ Bangladeshi/ Any other Asian Background)
- 4 Black / black British (Caribbean/ African/ Any other black background)
- 5 Chinese
- 6 Any other background
- 7 Prefer not to say

Q8

ASK ALL

MULTI CODE

How would you describe your household?

- 1 There are children aged under 1
- 2 There are children aged 1 - 2
- 3 There are children aged 3 - 4
- 4 There are primary school aged child/ren

- 5 There are child/ren aged 11 - 18
- 6 There are dependent children living with us aged 19+
- 7 There are non-dependent children living with us aged 19+
- 8 Children have all left home
- 9 Never had children

Interview questions

The research would involve taking part in one interview between the 26th February – 29th March and will last around 45-60 minutes. We will arrange days and times that are convenient for you.

Topics which will be discussed include how your awareness and understanding of Universal Credit, and your experiences around claiming Universal Credit and circumstances which may affect this. You will not be asked to disclose any amounts of money or answer any questions which you are not comfortable with. You can also withdraw from the interview at any time.

We would like to offer a £40 voucher as a “thank you” for your time for the interview.

Q9

ASK ALL

Are you happy to take part in an interview over the phone?

- 1 Yes
- 2 No (CLOSE)

Q10

ASK ALL

SINGLE CODE

It may be necessary for Ipsos UK to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research. Are you happy to agree to be re-contacted on this basis?

- 1 Yes
- 2 No (REFER TO OFFICE)

Q11

ASK ALL

SINGLE CODE

As a thank you for taking part, would you like to receive an e-voucher via email or a paper voucher through the post?

- 1 e-voucher
- 2 Paper voucher

RECRUITER – IF YES @Q10:

ALL:

TAKE DOWN NAME, PHONE NUMBER, EMAIL AND TIME AND DATE OF THE INTERVIEW AND SHARE WITH THE RESEARCH TEAM.

2.2.2 Recruitment screener – Couples Phase

1

Introduction

Good morning / afternoon / evening. Please could I speak to [named contact or appointee if available from sample]?

My name is and I am calling you from PWL Fieldwork, a research agency. We have been commissioned by the research organisation Ipsos to organise some research interviews on behalf of them and the Department for Work and Pensions (DWP). The research is about how DWP communicates with its customers and people's experience of being asked to move to Universal Credit. It will provide DWP with important information about how they can improve people's experiences of claiming Universal Credit. Ipsos also sent a letter about this research which you may have read.

We are contacting you as you should have recently received a letter from DWP regarding moving from [benefit claimed - in sample file] to Universal Credit. We would like to speak to you about this and any actions you may have taken since receiving your letter.

There are two types of interviews which you could be asked to take part in and depending on some of your answers. Either one telephone interview with either you or your partner or one face-to-face interview together as a couple. We would offer £40 to each partner per interview as a "thank you" for your time.

The interview will be conducted within the MRS (Market Research Society) Code of Conduct and General Data Protection Regulation 2018. This means that your responses will remain completely confidential and used for research purposes only. The findings will not identify you and no personal information will be shared with any third parties, including DWP. You can also choose not to answer any questions if you would prefer not to.

Taking part in this research is voluntary and will not affect any benefits or your relationship with DWP and the services you receive either now or in the future.

I just need to ask you a few questions before we confirm the interview and further details about it. Are you happy to proceed?

Screening questions

Q1A

ASK ALL

MULTI CODE

Which, if any, of the following benefits are you and your partner currently claiming, or have previously claimed?

- 1 JSA
- 2 Income Support
- 3 Housing Benefit
- 4 Employment Support Allowance

- 5 Child Tax Credit
- 6 Universal Credit
- 7 Something else (please specify)
- 8 Don't know (THANK AND CLOSE)

Q1B

ASK ALL WHO ANSWERED 1-5 AT Q1A. ASK FOR EACH BENEFIT ANSWERED AT Q1A.

MULTI CODE

And how long have you and your partner been / were you and your partner claiming [BENEFIT AT Q1A] for?

- 1 Less than 2 years
- 2 2 – 4 years
- 3 4 – 6 years
- 4 8 – 10 years
- 5 More than 10 years
- 6 Don't know

Q1C

ASK ALL

SINGLE CODE

Have you received a letter from DWP about moving from [benefit claimed - in sample file] to Universal Credit?

- 1 Yes
- 2 No (THANK AND CLOSE)
- 3 Don't know (THANK AND CLOSE)

Q2A

ASK ALL WHO RECEIVED MIGRATION NOTICE Q1A = 1

SINGLE CODE

Are you claiming Universal Credit?

- 1 Yes – we have both claimed and received our first payment
- 2 Yes - we have claimed but haven't received our first payment

- 3 Yes – one of us has claimed but not the other (ASK AND NOTE DOWN WHETHER THE ONE WHO HAS NOT CLAIMED HAS STARTED THE PROCESS / NOT STARTED AT ALL)
- 4 No – we started to make a claim but did not finish the process
- 5 No - we haven't claimed or started to make a claim

Q2B

ASK ALL WHO HAVE CLAIMED UC Q2A = 1 OR 2

SINGLE CODE

After receiving your Migration Notice, when did you are your partner make a UC claim?

- 1 During the first 3 months
- 2 During our extension period
- 3 Any time after 3 months, we did not have an extension
- 4 Any time after 4 months, we had an extension
- 5 Don't know

Q3

ASK ALL

MULTI CODE

What is your current employment status?

- 1 Full-time employment (30 hours or more a week)
- 2 Part-time employment (less than 30 hours a week)
- 3 Currently not in paid employment
- 4 In full-time education/studying
- 5 Look after the home / children
- 6 Carer
- 7 Retired
- 8 Prefer not to say (CLOSE)

Demographic questions

Q4

ASK ALL

SINGLE CODE

Which of the following describes how you think of yourself?

- 1 Male
- 2 Female
- 3 Non-binary
- 4 Prefer to use my own term
- 5 Prefer not to say

Q5

ASK ALL

How old were you on your last birthday?

NUMERIC

Q6

ASK ALL

Occupation of Chief Income Earner (Probe fully)

OPEN TEXT BOX

Q7

ASK ALL

SINGLE CODE

How would you describe your ethnicity?

- 1 White British / other white (British/ English/ Welsh/ Scottish/ Northern Irish/ Irish/ Any other white background
- 2 Mixed (White and Black Caribbean/ White and Black African/ White and Asian/ Any other mixed background
- 3 Asian (Indian/ Pakistani/ Bangladeshi/ Any other Asian Background
- 4 Black / black British (Caribbean/ African/ Any other black background
- 5 Chinese
- 6 Any other background
- 7 Prefer not to say

Q8

ASK ALL

MULTI CODE

How would you describe your household?

- 1 There are children aged under 1
- 2 There are children aged 1 - 2
- 3 There are children aged 3 - 4
- 4 There are primary school aged child/ren
- 5 There are child/ren aged 11 - 18
- 6 There are dependent children living with us aged 19+
- 7 There are non-dependent children living with us aged 19+
- 8 Children have all left home
- 9 Never had children

Interview questions

The research would involve taking part in one interview between the 10th – 28th June and will last around 45-60 minutes. We will arrange a day and time that is convenient for you.

Topics which will be discussed include how you make financial decisions as a couple, your awareness and understanding of Universal Credit, and your experiences around claiming Universal Credit together and circumstances which may affect this. You will not be asked to disclose any amounts of money or answer any questions which you are not comfortable with. You can also withdraw from the interview at any time.

[IF ELIGIBLE FOR TELEPHONE:] We would like to offer a £40 voucher as a “thank you” for the partner who we speak to over the phone.

[IF ELIGIBLE FOR F2F:] We would like to offer each of you a £40 voucher each as a “thank you” for your time for the joint in-person interview.

Q9

ASK ALL

Are you happy to take part in an interview over the phone?

- 1 Yes
- 2 No (CLOSE)

Q10

ASK ALL

Are you happy to take part in a face-to-face interview?

- 1 Yes
- 2 No (CLOSE)

Q10a

ASK ALL HAPPY FOR F2F INTERVIEW (Q10 = 1)

Where would you prefer your in-person interview to take place: are you comfortable with an interviewer coming to your home, or if you would prefer, we can arrange an alternative location which is convenient for you.

- 1 In-home
- 2 Alternative location
- 3 Does not want to do face to face

Q11

ASK ALL

SINGLE CODE

It may be necessary for Ipsos UK to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research. Are you happy to agree to be re-contacted on this basis?

- 3 Yes
- 4 No (REFER TO OFFICE)

Q12

ASK ALL

SINGLE CODE

As a thank you for taking part, would you like to receive an e-voucher via email or a paper voucher through the post?

- 3 e-voucher
- 4 Paper voucher

RECRUITER – IF YES @Q11:

ALL:

TAKE DOWN NAME, PHONE NUMBER, EMAIL AND TIME AND DATE OF THE INTERVIEW AND SHARE WITH THE RESEARCH TEAM.

FOR F2F INTERVIEWS, DISCUSS AND SHARE ALTERNATIVE LOCATION FOR THE INTERVIEW WITH THE RESEARCH TEAM. ALTERNATIVELY, THE RESEARCH TEAM CAN SUGGEST ONE BASED ON COUPLES' ADDRESS. CONFIRM OTHER PARTNER'S PHONE NUMBER IF YOU NEED TO SPEAK TO THEM AT A LATER TIME TO RECORD CONSENT TO TAKE PART.

2.2.3 Recruitment screener – Singles Phase 2

Introduction

Good morning / afternoon / evening. Please could I speak to [named contact or appointee if available from sample]?

My name is and I am calling you from Paton Williamson Consultancy, a research and recruitment consultancy. We have been commissioned by the research organisation Ipsos to organise some research interviews on behalf of them and the Department for Work and Pensions (DWP). The research is about how DWP communicates with its customers and people's experience of being asked to move to Universal Credit. It will provide DWP with important information about how they can improve people's experiences of claiming Universal Credit. Ipsos also sent a letter about this research which you may have read.

We are contacting you as you should have recently received a letter from DWP regarding moving from [benefit claimed - in sample file] to Universal Credit. We would like to speak to you about this and any actions you may have taken since receiving your letter.

You could be asked to take part in a telephone interview, and we would offer £30 shopping voucher as a "thank you" for your time. The interview will last around 45 minutes.

The interview will be conducted within the MRS (Market Research Society) Code of Conduct and General Data Protection Regulation 2018. This means that your responses will remain completely confidential and used for research purposes only. The findings will not identify you and no personal information will be shared with any third parties, including DWP. You can also choose not to answer any questions if you would prefer not to. Your responses will be anonymous and identifiable information about you will not be passed on to anyone, including back to DWP or any other government department.

You have the right to request a copy of your data, change your data or withdraw from this research at any point. If you wish to discuss these rights, have any concerns, or want to make any requests about your personal data please contact the Ipsos team at uk-pa-dwp-claimingbenefits@ipsos.com.

If you would like to find out more about the research, you can get e-mail Sally-Ann Barber at Ipsos (sally-ann.barber@ipsos.com) or Katherine Hicks at DWP (uc.research@dwp.gov.uk)

Taking part in this research is voluntary and will not affect any benefits or your relationship with DWP and the services you receive either now or in the future.

I just need to ask you a few questions before we confirm the interview and further details about it. Are you happy to proceed?

Screening questions

Q1A

ASK ALL

SINGLE CODE

Have you received a letter from DWP about moving to Universal Credit?

- 1 Yes
- 2 No (THANK AND CLOSE)
- 3 Don't know (THANK AND CLOSE)

Q1B

ASK ALL

MULTI CODE

Which, if any, of the following benefits are you currently claiming, or have previously claimed?

- 1 Income Support
- 2 Housing Benefit
- 3 Employment Support Allowance
- 4 Universal Credit
- 5 Something else (please specify)
- 6 Don't know (THANK AND CLOSE)

Q1C

ASK ALL WHO ANSWERED 1-5 AT Q1B (ASK FOR EACH BENEFIT AT Q1B)

MULTI CODE

Please choose an option that you think best fits how long you have been / were claiming [BENEFIT at Q1B]:

- 1 Less than 1 year
- 2 1 – 2 years
- 3 3 – 4 years
- 4 5 – 6 years
- 5 7 – 8 years
- 6 9 – 10 years
- 7 More than 10 years
- 8 Don't know

Q2A

ASK ALL CLAIMING UC (Q1B = 4)

SINGLE CODE

You mentioned that you are claiming Universal Credit. Which of the following best apply?

- 1 I have received several payments
- 2 I have received my first payment
- 3 I haven't received my first payment
- 4 Don't know

Q2B

ASK ALL NOT CLAIMING UC (Q1B = 4)

SINGLE CODE

You mentioned that you are not claiming Universal Credit. Which of the following best apply?

- 1 I started to make a claim but did not finish the process
- 2 I haven't claimed or started to make a claim

Q2C

ASK ALL CLAIMING UC (Q1B=4) OR STARTED TO MAKE A UC CLAIM (Q2B = 1)

SINGLE CODE

How did you make your UC claim?

- 1 Over the telephone
- 2 Online
- 3 Don't know

Q2D

ASK ALL IS (Q1B=1) AND ESA (Q1B=3) CUSTOMERS

SINGLE CODE

Did you receive any calls or home visits to prompt you to make your claim?

- 1 Yes, received a call and a home visit
- 2 Yes, received a call but not a home visit
- 3 Yes, received a home visit but not a call

- 4 No, did not receive either
- 5 Don't know

Q2E

ASK ALL CLAIMING UC (Q1B=4)

SINGLE CODE

After receiving your Migration Notice, when did you make a UC claim?

- 1 During the first 3 months, before the Migration Notice date
- 2 During the extension period
- 3 Any time after 3 months, I did not have an extension
- 4 Any time after 4 months, I had an extension
- 5 Don't know

Demographic questions

Q3

ASK ALL

MULTI CODE

What is your current employment status?

- 1 Full-time employment (30 hours or more a week)
- 2 Part-time employment (less than 30 hours a week)
- 3 Self-employed
- 4 Currently not in paid employment
- 5 In full-time education/studying
- 6 Look after the home / children
- 7 Retired
- 8 Prefer not to say (CLOSE)

Q4

ASK ALL

SINGLE CODE

Do you look after, or give any help or support to, anyone because they have long-term physical or mental health conditions or illnesses, or difficulties related to old age? Exclude anything you do as part of your paid employment

- 1 Yes
- 2 No
- 3 Don't know / prefer not to say

Q5

ASK ALL

SINGLE CODE

Which of the following describes how you think of yourself?

- 1 Male
- 2 Female
- 3 Non-binary
- 4 Prefer to use my own term
- 5 Prefer not to say

Q6

ASK ALL

How old were you on your last birthday?

NUMERIC

Q7

ASK ALL

What is the main job of the person in your household who earns the most money?

OPEN TEXT BOX

Q8

ASK ALL

SINGLE CODE

How would you describe your ethnicity?

- 1 White British / other white (British/ English/ Welsh/ Scottish/ Northern Irish/ Irish/ Any other white background)
- 2 Mixed (White and Black Caribbean/ White and Black African/ White and Asian/ Any other mixed background)
- 3 Asian (Indian/ Pakistani/ Bangladeshi/ Any other Asian Background)

- 4 Black / black British (Caribbean/ African/ Any other black background)
- 5 Chinese
- 6 Any other background
- 7 Prefer not to say

Q9

ASK ALL

MULTI CODE

How would you describe your household?

- 1 There is a child/ there are children aged under 1
- 2 There is a child/ there are children aged 1 - 2
- 3 There is a child/ there are children aged 3 - 4 who hasn't / haven't started reception
- 4 There are primary school aged children (aged up to and including 11)
- 5 There is a child/there are children aged 12-18
- 6 There are dependent children living with us aged 19+
- 7 There are non-dependent children living with us aged 19+
- 8 Children have all left home
- 9 Never had children

Interview questions

The research would involve taking part in one interview between the 18th November 2024 – 24th January 2025 and will last around 45 minutes. We will arrange days and times that are convenient for you.

Topics which will be discussed include your awareness and understanding of Universal Credit, your experiences around claiming Universal Credit and circumstances which may affect these experiences. You will not be asked to disclose any amounts of money or answer any questions which you are not comfortable with. You can also withdraw from the interview at any time.

We would like to offer a £30 voucher as a “thank you” for your time for the interview.

Q10

ASK ALL

SINGLE CODE

Are you happy to take part in an interview over the phone?

- 1 Yes
- 2 No (CLOSE)

Q11

ASK ALL

SINGLE CODE

It may be necessary for Ipsos UK to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research. Are you happy to agree to be re-contacted on this basis?

- 1 Yes
- 2 No (REFER TO OFFICE)

Q12

ASK ALL

SINGLE CODE

As a thank you for taking part, would you like to receive an e-voucher via email or a paper voucher through the post?

- 1 e-voucher
- 2 Paper voucher

RECRUITER – IF YES @Q10:

ALL:

TAKE DOWN NAME, PHONE NUMBER, EMAIL AND TIME AND DATE OF THE INTERVIEW AND SHARE WITH THE RESEARCH TEAM

2.2.4 Recruitment screener – Couples Phase

2

Introduction

Good morning / afternoon / evening. Please could I speak to [named contact or appointee if available from sample]?

My name is and I am calling you from Paton Williamson Consultancy, a research and recruitment consultancy. We have been commissioned by the research organisation Ipsos to organise some research interviews on behalf of them and the Department for Work and Pensions (DWP). The research is about how DWP communicates with its customers and people's experience of being asked to move to

Universal Credit. It will provide DWP with important information about how they can improve people's experiences of claiming Universal Credit. Ipsos sent a letter about this research which you may have read.

We are contacting you as you should have recently received a letter from DWP regarding moving from [benefit claimed - in sample file] to Universal Credit. We would like to speak to you about this and any actions you may have taken since receiving your letter.

There are two types of interviews which you could be asked to take part in and depending on some of your answers. Either a telephone interview with either you or your partner or a face-to-face interview together as a couple. We would offer £30 to each partner per interview as a "thank you" for your time. The telephone interview will last around 45 minutes and the face-to-face interviews will last around 1 hour.

The interview will be conducted within the MRS (Market Research Society) Code of Conduct and General Data Protection Regulation 2018. This means that your responses will remain completely confidential and used for research purposes only. The findings will not identify you and no personal information will be shared with any third parties, including DWP. You can also choose not to answer any questions if you would prefer not to. Your responses will be anonymous and identifiable information about you will not be passed on to anyone, including back to DWP or any other government department.

You have the right to request a copy of your data, change your data or withdraw from this research at any point. If you wish to discuss these rights, have any concerns, or want to make any requests about your personal data please contact the Ipsos team at uk-pa-dwp-claimingbenefits@ipsos.com.

If you would like to find out more about the research, you can get e-mail Sally-Ann Barber at Ipsos (sally-ann.barber@ipsos.com) or Katherine Hicks at DWP (uc.research@dwp.gov.uk).

Taking part in this research is voluntary and will not affect any benefits or your relationship with DWP and the services you receive either now or in the future.

- I just need to ask you a few questions before we confirm the interview and further details about it. Are you happy to proceed?

Screening questions

Q1A

ASK ALL

SINGLE CODE

Have you received a letter from DWP about moving to Universal Credit?

- 1 Yes
- 2 No (THANK AND CLOSE)

3 Don't know (THANK AND CLOSE)

Q1B

ASK ALL

MULTI CODE

Which, if any, of the following benefits are you and your partner currently claiming, or have previously claimed?

- 1 Income Support
- 2 Housing Benefit
- 3 Employment Support Allowance
- 4 Universal Credit
- 5 Something else (please specify)
- 6 Don't know (THANK AND CLOSE)

Q1C

ASK ALL WHO ANSWERED 1-5 AT Q1B (ASK FOR EACH BENEFIT AT Q1B)

MULTI CODE

Please choose an option that you think best fits how long you and your partner have been / were claiming [BENEFIT at Q1B]:

- 1 Less than 1 year
- 2 1 – 2 years
- 3 3 – 4 years
- 4 5 – 6 years
- 5 7 – 8 years
- 6 9 – 10 years
- 7 More than 10 years
- 8 Don't know

Q2A

ASK ALL CLAIMING UC (Q1B = 4)

SINGLE CODE

You mentioned that you and/or your partner are claiming Universal Credit. Which of the following best apply?

- 1 We have both claimed and received several payments

- 2 We have both claimed and received our first payment
- 3 We have claimed but haven't received our first payment
- 4 One of us has claimed but not the other (ASK AND NOTE DOWN WHETHER THE ONE WHO HAS NOT CLAIMED HAS STARTED THE PROCESS / NOT STARTED AT ALL)
- 5 Don't know

Q2B

ASK ALL NOT CLAIMING UC (Q1B = !4)

SINGLE CODE

You mentioned that you and your partner not claiming Universal Credit. Which of the following best apply?

- 1 We started to make a claim but did not finish the process
- 2 We haven't claimed or started to make a claim

Q2C

ASK ALL CLAIMING UC (Q1B=4) OR STARTED TO MAKE A UC CLAIM (Q2B = 1)

SINGLE CODE

How did you and your partner make your UC claim?

- 1 Over the telephone
- 2 Online
- 3 Don't know

Q2D

ASK ALL IS (Q1B=1) AND ESA (Q1B=3) CUSTOMERS

SINGLE CODE

Did you receive any calls or home visits to prompt you to make your claim?

- 1 Yes, received a call and a home visit
- 2 Yes, received a call but not a home visit
- 3 Yes, received a home visit but not a call
- 4 No, did not receive either
- 5 Don't know

Q2E

ASK ALL CLAIMING UC (Q1B=4)

SINGLE CODE

After receiving your Migration Notice, when did you and your partner make a UC claim?

- 1 During the first 3 months, before the Migration Notice date
- 2 During our extension period
- 3 Any time after 3 months, we did not have an extension
- 4 Any time after 4 months, we had an extension
- 5 Don't know

Demographic questions

Q3

ASK ALL

MULTI CODE

What is your current employment status?

- 1 Full-time employment (30 hours or more a week)
- 2 Part-time employment (less than 30 hours a week)
- 3 Self-employed
- 4 Currently not in paid employment
- 5 In full-time education/studying
- 6 Look after the home / children
- 7 Retired
- 8 Prefer not to say (CLOSE)

Q4

ASK ALL

SINGLE CODE

Do you look after, or give any help or support to, anyone because they have long-term physical or mental health conditions or illnesses, or difficulties related to old age? Exclude anything you do as part of your paid employment

- 1 Yes
- 2 No
- 3 Don't know / prefer not to say

Q5

ASK ALL

SINGLE CODE

Which of the following describes how you think of yourself?

- 1 Male
- 2 Female
- 3 Non-binary
- 4 Prefer to use my own term
- 5 Prefer not to say

Q6

ASK ALL

How old were you on your last birthday?

NUMERIC

Q7

ASK ALL

What is the main job of the person in your household who earns the most money?

OPEN TEXT BOX

Q8

ASK ALL

SINGLE CODE

How would you describe your ethnicity?

- 1 White British / other white (British/ English/ Welsh/ Scottish/ Northern Irish/ Irish/ Any other white background)
- 2 Mixed (White and Black Caribbean/ White and Black African/ White and Asian/ Any other mixed background)
- 3 Asian (Indian/ Pakistani/ Bangladeshi/ Any other Asian Background)
- 4 Black / black British (Caribbean/ African/ Any other black background)
- 5 Chinese
- 6 Any other background

7 Prefer not to say

Q9

ASK ALL

MULTI CODE

How would you describe your household?

- 1 There is a child/ there are children aged under 1
- 2 There is a child/ there are children aged 1 - 2
- 3 There is a child/ there are children aged 3 - 4 who hasn't / haven't started reception
- 4 There are primary school aged children (aged up to and including 11)
- 5 There is a child/there are children aged 12-18
- 6 There are dependent children living with us aged 19+
- 7 There are non-dependent children living with us aged 19+
- 8 Children have all left home
- 9 Never had children

Interview questions

The research would involve taking part in one interview between the 18th November 2024 – 24th January 2025 and will last around 45 minutes. We will arrange a day and time that is convenient for you.

Topics which will be discussed include how you make financial decisions as a couple, your awareness and understanding of Universal Credit, your experiences around claiming Universal Credit together and circumstances which may affect this. You will not be asked to disclose any amounts of money or answer any questions which you are not comfortable with. You can also withdraw from the interview at any time.

[IF ELIGIBLE FOR TELEPHONE:] We would like to offer a £30 voucher as a “thank you” for the partner who we speak to over the phone.

[IF ELIGIBLE FOR F2F:] We would like to offer each of you a £30 voucher each as a “thank you” for your time for the joint in-person interview.

Q10

ASK ALL

SINGLE CODE

Are you happy to take part in an interview over the phone?

- 1 Yes
- 2 No

Q11

ASK ALL

SINGLE CODE

Are you happy to take part in a face-to-face interview? Please note that we are organising a limited number of face-to-face interviews.

- 1 Yes
- 2 No

Q11a

ASK THOSE HAPPY FOR F2F INTERVIEW (Q11=1)

SINGLE CODE

Where would you prefer your in-person interview to take place: are you comfortable with an interviewer coming to your home, or if you would prefer, we can arrange an alternative location which is convenient for you.

- 1 In-home
- 2 Alternative location
- 3 Does not want to do face to face

Q12

ASK ALL

SINGLE CODE

It may be necessary for Ipsos UK to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research. Are you happy to agree to be re-contacted on this basis?

- 1 Yes
- 2 No (REFER TO OFFICE)

ASK ALL

SINGLE CODE

As a thank you for taking part, would you like to receive an e-voucher via email or a paper voucher through the post?

- 3 e-voucher
- 4 Paper voucher

RECRUITER – IF YES @Q11 OR Q10:

ALL:

TAKE DOWN NAME, PHONE NUMBER, EMAIL AND TIME AND DATE OF THE INTERVIEW AND SHARE WITH THE RESEARCH TEAM.

FOR F2F INTERVIEWS, DISCUSS AND SHARE ALTERNATIVE LOCATION FOR THE INTERVIEW WITH THE RESEARCH TEAM. ALTERNATIVELY, THE RESEARCH TEAM CAN SUGGEST ONE BASED ON COUPLES' ADDRESS. CONFIRM OTHER PARTNER'S PHONE NUMBER IF YOU NEED TO SPEAK TO THEM AT A LATER TIME TO RECORD CONSENT TO TAKE PART.

2.3.1 Discussion guide – Singles Phase 1

Aims and objectives

The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct qualitative research to understand how a pilot sample of legacy benefit customers will experience the move to Universal Credit. Legacy benefits include Jobseekers Allowance, Income Support and Housing Benefit, and Employment Support Allowance who also claim Housing benefit and / or Child Tax Credit. This research aims to identify any specific challenges for this cohort in moving to UC and how these can be addressed before the wider rollout.

This discussion guide is to be used in 45–60-minute telephone interviews.

This research aims to:

- Understand customers' knowledge and awareness of UC and attitudes towards it, prior to receiving the Migration Notice amongst this group of legacy benefit customers
- The extent to which these legacy benefit customers understand the Move to UC process
- Understanding legacy benefit customers' journey to UC, from the point of receiving the Migration Notice onwards, either through making a claim and receiving payments, or deciding not to claim
- What actions legacy benefit customers are taking in response to their Migration Notice
- Why legacy customers do / not decide to make a claim for UC
- Barriers to customers successfully making a claim for UC and how these can be addressed

- Early findings for these customers and what further support they may need from DWP to successfully make a claim for UC

Interviewer information:

- Fieldwork will run between 4th March – 10th April 2024
- 42 single customers will be interviewed
- Participants will be given a £40 shopping voucher for taking part. This can be a digital or paper voucher depending on their preference.
- The interviews will be recorded as well as interviewer notes in an analysis grid.
- An analysis session (2 hours) will be held after the interviews, after which a brief summary of findings will be provided.

Introduction 2-3 mins

- Thank participants for taking part. Introduce self and explain nature of interview: informal conversation; all opinions valid. Interviews should take around 45-60 minutes.
- Role of Ipsos – Independent research organisation (i.e. independent of government), we adhere to the MRS Code of Conduct.
- Introduce research and topic – The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct research among customers who are claiming benefits and have been asked to move to Universal Credit. This interview is to learn a bit about you and how you make decisions. We will be asking you some questions about how you manage your household finances, but we will not ask you for any actual figures about your income or outgoings, or for details of your spending.
- Voluntary nature of discussion: reiterate that their participation is voluntary (they can withdraw at any time during the interview). You can decide how much you would like to share with me throughout this interview as well as not to answer any questions if you prefer. Just let me know at any time if you would prefer not to answer a question and we will move on. We understand some of the topics we will be discussing are sensitive and can be personal.
- Confidentiality – reassure all responses are anonymous and that identifiable information about them will not be passed on to anyone, including back to DWP or any other government department. Inform participants that the only situation in which Ipsos might have to pass on something they tell us or that happens during an interview, or their personal details, would be if something made the interviewer seriously concerned that they, or someone else, was at serious risk of harm. Reassure them that participation will have no impact on their Universal Credit claim or any dealings with DWP now or in the future.

- Accessing support after the interview: following these interviews, we want to encourage people to access advice or support if they feel it would benefit them. We are providing everyone we speak to with an information leaflet. This includes details of organisations which can provide services relevant to the topics we will speak about today. It is not because of anything that has been or will be said, or done, that has prompted Ipsos to give you this. This is standard across the project.
- Consent – check that they are happy to take part in the interview.
- Ask for permission to digitally record – START RECORDING - GDPR requires a legal basis to process your data. Our legal basis is your consent which you are free to withdraw at any point during or after the research (up until the beginning of July 2024 - after this time the data would have been analysed and cannot be removed). Are you happy to continue?
- Confirm if they a) received a letter about the move from [current benefit] to Universal Credit i.e., the Migration Notice b) have made a claim for Universal Credit.
- Any questions before we begin?

Background and context 5 mins

To start off with, I'd like to ask a few questions about you.

Warm up:

Name / ask how they are / what keeps them busy

Cover briefly:

Can you tell me a bit about yourself? Probe:

- Family and home life – who else lives with them, any other caring responsibilities.
- Housing - how long they have lived in their area? In their current home?
- Work – work status. IF working - self-employed or employed?
- Work history – if currently working, have they always done this type of work, if not, what did they used to do, any non-working spells.
- Digital capability – how confident do you feel with using the internet for tasks like emailing, searching for information online, online banking, and filling out online forms?
- Benefits – are you receiving any other benefit outside of [benefit claimed]?
 - How long have you been claiming [benefit/s claimed]? Record length of time.
 - How does this benefit support you? Is there anything specific it goes towards?

- Jobcentre Plus – Have you ever had contact with Jobcentre Plus?
- Any changes in their lives recently? Do you expect there to be any changes in the near future? For example, moving house, having a baby, changing jobs, receiving a promotion etc.
- Universal Credit - Have you received a letter from DWP about the move from your [current benefit] to Universal Credit? Check for awareness, general understanding and spontaneous views of Universal Credit briefly to help frame the rest of the discussion. We will talk about it in more detail in the next section.

Understanding and awareness of UC 5-10 mins

Now I'd like to ask you a bit more about Universal Credit.

Awareness and understanding of Universal Credit more generally:

- Have you heard of Universal Credit before?
 - If yes: Where did you hear about it? E.g. from DWP / friends & family / saw that [current benefit] was ending
- Could you please tell me in your own words what you think Universal Credit is?
- How do you feel about Universal Credit?

I'd like to ask you about a letter the Department for Work and Pensions recently sent you about moving from [current benefit] to Universal Credit.

Awareness and understanding of Universal Credit following prompts around migration letter:

- What did you do with the Migration letter when it arrived? Probe on: read it immediately, filed to read later, skim read.
- Can you tell me in own words what you need to do to claim Universal Credit?
- How did you feel about receiving this letter? Probe on : expecting to move to UC / surprised / concerned?
- How easy or difficult was it to understand the letter?
- Did someone help you to read and understand the letter?
 - If yes: Who provided this support? Probes: friend / family member / support worker / carer / organisation
- Have you received a reminder letter? If yes probe on: how they felt about receiving the reminder / what action, if any, they took after receiving the reminder

- Have you claimed Universal Credit / started the journey to move to UC? If not:
 - Do you plan to do so?
 - Have you received an extension on your deadline to move to UC? If yes:
- What was the impact of extending your deadline to move to UC?
- Can you talk me through the steps you took to apply or

Moderator to take note of this and ensure questions in the next sections are framed around their response. Section 6 is tailored to those who have already made a UC claim or started the process, and Section 7 will be asked to those who have not yet made a claim / started the process. Take note if they say they plan to make a claim, as Section 7 questions will differ depending on whether or not they plan to claim.

ASK THOSE WHO ARE CLAIMING INCOME SUPPORT AND ESA WHO HAVE RECEIVED THEIR MIGRATION NOTICE DEADLINE AND NOT MADE A UC CLAIM:

- Have you received any calls from the Move to UC Helpline? Prompt: These were calls that reminded you to make a claim before your migration deadline ended. If yes:
 - What was your experience of this / these call/s?
 - What impact did they have on how you felt about claiming UC? What action did you take as a result of these calls?
- How do you think moving from [current benefit] to Universal Credit might / does affect you?
 - Do you feel that you have a choice about moving to Universal Credit?
- What information would be most important / helpful for you to know about moving to Universal Credit?
- Have you heard of Transitional Protection? What can you tell me about it?

Understanding how legacy benefit customers manage finances 10-15 mins

Next, I'd like to talk a bit about your home life and how you make financial decisions. This will be helpful to understand the factors that might / have influence/d your decision to claim Universal Credit.

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY – if it seems like a particular topic is uncomfortable to discuss, move on.

Finance management

- How do you manage your household finances? Probe on budgeting / how they do this.

- How much effort is managing your finances? For example, administration behind it, tracking payment dates, completing forms, budgeting (if this is done), making payments etc.
- How do you manage the responsibility of paying your rent/mortgage?
 - How do you pay for this? Probes: Do you pay for this directly, or by a benefit directly to your landlord (by APA)
- How do you feel about doing finance related tasks online? What makes you say this? For example, checking account balances, transferring money, paying bills
- Are there any other factors which influence how you manage your finances?
 - Debt – credit cards, loans, other financial difficulties
 - Unexpected drops in income e.g., changes in employment, health concerns/costs
 - To what extent did these other factors influence your decision to claim UC? Are you aware how this might impact your claim?

Income and how they use their current benefit

- What would you say is your main source of income?
- Where does [current benefit] fit into this? Moderator to get a sense of whether these sources of income are essential vs. a nice to have/top up. Gauge level of participant reliance on [current benefit]
- Do you use [current benefit] to cover specific expenses? How do you decide this?
- What other sources of income do you have?
- Are you saving / putting money away for the future?

Financial decisions

- How do you decide your priorities when making financial decisions? Is there anything that helps you make these financial decisions? Or makes it more difficult?
- To what extent do you seek advice when making financial decisions? For example, getting a loan, paying off debt etc.
 - If none: why not? Is there anything that puts you off? Or prevents you?
 - If yes: Where do you look for advice or from who? What makes you choose these sources? E.g., family, friends, via telephone, websites, online calculators, GOV.UK website. Third party: Citizens Advice, other charities.

- What types of financial decisions do you feel advice/information is needed for (versus relying on your own knowledge)? Why? How are different sources of information used?
- What kind of impact does this advice or information have on your financial decisions?

FOR HOUSING BENEFIT CUSTOMERS ONLY: I'd like to talk a bit about your experience with local authorities.

Local Authorities

- Have you ever been in contact with your local authority? If yes:
 - How often are you in contact with them?
 - What type of information do you need to provide your local authority with to receive Housing Benefit?
- Have your local authority ever been in contact with you? If yes:
 - How often do they contact you?
 - What type of information are they requesting / communicating?
- What is your overall experience of receiving Housing Benefit?

Understanding the impact of the move to UC 15 mins

Let's move on, I'd like to talk about context and how your personal circumstances might affect your decision / how they have affected your decision to apply for Universal Credit.

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY

Advice

- To what extent did you / will you seek advice about whether to apply for Universal Credit?
 - If no / none: why not?
 - If yes: Where did / will you look for advice or information? Or from who? Why did / would you choose these sources? E.g., family, friends, websites, online calculators, Jobcentre Plus, DWP helpline, guidance webpages, Citizen's Advice and Understanding Universal Credit, GOV.UK website.
- If contacted the DWP helpline: How was your interaction with the DWP helpline?
- What did it tell you about Universal Credit?
- Is / was there anything specific you were looking for advice on? Why?
- What impact did / does this advice or information have on your decision to claim? And when you made your claim?

- Did / will you use a benefit calculator at any point? How did / will this affect your decision to claim?

Universal Credit compared to [current benefit]

- What do you find appealing about claiming Universal Credit compared to [current benefit]? Or is [current benefit] more appealing to Universal Credit? In what way?
 - What impact did/does this have on your decision-making about claiming UC?
- What impact did you / do you expect UC to have on your overall benefit payment amount? Probe: did they check how much they could claim/ did they / do they expect to receive the same amount as they did claiming [current benefit]? How did / do they feel about this potentially not being the case?
 - What impact did/does this have on your decision-making about claiming UC by your migration deadline/at all?
- How does the conditionality of UC compare to your [current benefit]?
 - What impact did/does this have on your decision-making about claiming UC?

Employment status / savings

- How did / does your employment status feed into your decision-making process to claim UC?
 - Probe specifically on when they made their claim / when they will make their claim
- (For those with savings): How did / do savings influence your decision to claim Universal Credit?
 - What did / do you know about how having savings affects a Universal Credit claim?
 - How did this affect your decision-making about claiming?
 - Are you aware of the savings exemption under the move to Universal Credit?
 - If yes: can you explain it to me in your own words? How did / does this affect your decision to claim?
- How has / would claiming Universal Credit affected your employment, if at all?
 - The hours you work/ed, how much you can earn?

- How did / do you expect UC would affect your employment, if at all? How was / is this made clear or through what sources? Probe: Childcare costs, Savings plans/habits/goals, Future plans/goals in general, especially work-related

Other concerns / final factors

- Were / are there any concerns you had at the time of / have about making the claim?
 - Probe the influence the above points had on the timing of their claim, if at all.
 - How did / does this impact your decision to claim?
 - Did / would any of these concerns become reality? If yes: how did this impact your claim?
- Are / were there any other factors that influence/d your decision to claim Universal Credit that we haven't discussed?
 - How does / did this change your approach to making a decision, if at all?
 - Any positives? Negatives?
 - Past learnings or experiences?
- What would be / was the deciding factor for you to apply for Universal Credit, if any?
 - Why is / was this?

Understanding the UC journey among those who have already claimed / started process 15 mins

MODERATOR: ASK THIS SECTION IF ALREADY CLAIMED UC / BEGUN PROCESS OF CLAIMING UC

You mentioned earlier that you have begun the process of claiming UC / already claimed UC. I'd like to ask some questions to understand the journey you took to do this.

UC Journey

- Can you talk me through the process of claiming Universal Credit, step by step?
 - What did you have to do?
- How did you find the process?
 - How easy or difficult was it? Probe:
 - Making a claim online / completing the application
 - Verifying ID. For those who had to verify their ID at the Jobcentre: how did you feel about going into Jobcentre Plus to verify your ID? How did you find this experience?

- Was there anything that put you off the application process initially, or prevented you from completing it? For what reasons?
 - If yes: What made you come back to it at a later stage? What do you think could be done to improve this?
- Did you have any problems in making a claim that haven't been mentioned?
- Anything that helped you make a claim? Did anything surprise you about the process?
 - Did you apply for an advance payment of Universal Credit? Did you receive this?
 - Did you receive a Transitional Protection supplement?
- How did you find the input needed from you to claim UC compared to [current benefit]?
 - How did you approach this?
 - How prepared did you feel for this level of involvement? Why?

Probe: if information provided by DWP was sufficient e.g., gave an accurate description of what the process would look like, how long, how many steps etc.
 - What impact did this have on when you made your claim / how quickly you were able to make your claim?
- Were any other benefits you received affected because of your claim for Universal Credit?
 - How is this similar or different to how you expected Universal Credit to impact your eligibility for other benefits?
 - Did you seek advice or information about how you could be impacted? From who? What sources? How did you apply this? What impact did it have?

Communication with DWP

- Have you communicated with DWP about to your claim or move from [current benefit]?
 - If no: why?
 - What would your preferred way be to communicate with DWP? E.g., online, telephone, face-to-face, video calls. Why is this?
 - What type of situation or query would prompt you to contact them?
 - If yes: what was the communication about?

- How did you find this experience? What made it a positive or negative one? Probe on staff interaction specifically.

Understanding the main barriers to UC among those who have not yet claimed or started the process 15 mins

MODERATOR: ASK THIS SECTION IF NOT YET CLAIMED UC

You mentioned earlier that you haven't started the process of claiming UC. I'd like to ask some questions to understand why that is.

MODERATOR: words in bold italics are for those who haven't claimed but said they intend to. Please don't read out the words in bold italics to customers who have said they haven't claimed and don't intend to.

UC Journey

- Can you talk me through your understanding of the process of claiming Universal Credit, step by step?
 - Did / does have you look / looked at the application process to see what you would need to do to make a claim?
 - Have you started the application?
 - How difficult or easy did / does it seem to you to make a claim?
Probe:
 - Making a claim online
 - Verifying ID
 - To what extent did your decision not to claim relate to the process of claiming so far?
- What is your understanding of the individual work conditionality requirements for claiming UC?
 - What impact, if any, does / did this have on your decision not to claim so far?

Communication with DWP

- Have you received a termination letter? If yes: tell me in your own words the key messages this letter communicated to you? How did it make you feel? What action, if any, have you taken since?
- Have you communicated with DWP about UC?
 - If no: why?
 - What would your preferred way be to communicate with DWP? E.g., online, telephone, face-to-face, video calls. Why is this?
 - What type of situation or query would prompt you to contact them?

- If yes: what was the communication about?
 - How did you find this experience? What made it a positive or negative one?
 - How did you find the DWP staff that you spoke to? Why was that?

Other factors

- Was / is there anything else that influenced / has influenced your decision to delay making a Universal Credit claim?
 - Were/ are there any other factors that influenced your decision not to claim Universal Credit so far that we haven't already discussed. Probe on positives and negatives

Moderator: Do not ask the following questions to those who have already said they intend to claim in the future

- Would you consider claiming for Universal Credit in the future?
 - Is there are a particular time in the future that you would consider claiming? Why is that?
 - Probe on factors influencing this e.g. employment changes; childcare costs

Summing up 2-3 mins

We are coming to the end of the interview, but I have a few final questions before we finish.

- If there was one thing that DWP could do to best support you going forward what would it be?
- If already claimed / started to claim UC: What would be the most important thing for us to feed back to DWP about your experience of Universal Credit?
- If not claimed UC: What would be the most important thing for us to feed back to DWP about Universal Credit?
- Finally, is there anything else you would like to mention that we haven't had the opportunity to discuss?

Thank and reiterate confidentiality. Incentives = a £40 e-voucher or paper voucher each as a 'thank you' from Ipsos for their time and contribution.

2.3.2 Discussion guide – Couples Phase 1

Aims and objectives

The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct qualitative research to understand the experiences of a pilot group of legacy benefit customers in the move to Universal Credit.

Legacy benefits include Jobseekers Allowance, Income Support and Housing Benefit, and Employment Support Allowance who also claim Housing benefit and / or Child Tax Credit. This research aims to identify any specific challenges for this cohort in moving to UC and how these can be addressed before the wider rollout.

This discussion guide is to be used in 45–60-minute telephone or face to face interviews.

This research needs to explore:

- Customers' knowledge and awareness of UC and attitudes towards it, prior to receiving the Migration Notice amongst this group of legacy benefit customers
- The extent to which these legacy benefit customers understand the Move to UC process
- Legacy benefit customers' journey to UC, from the point of receiving the Migration Notice onwards, either through making a claim and receiving payments, or deciding not to claim
- The actions legacy benefit customers are taking in response to their Migration Notice
- Why legacy customers decide to / not to make a claim for UC
- Barriers to customers successfully making a claim for UC and how these can be addressed
- Early findings for these customers and what further support they may need from DWP to successfully make a claim for UC
- Couple dynamics and how these feed into their financial decision-making processes, particularly in relation to moving to Universal Credit.

Interviewer information

- Fieldwork will run between 13th May – 28th June 2024
- 30 couple customers will be interviewed. 9 of these will be face to face, where both partners will be present for the interview. The remaining 21 interviews will be held over the telephone with one partner from the couple.
- For F2F interviews where both partners are being interviewed, please probe both members throughout and prioritise the questions around couple dynamics / differences and how they make decisions together / went through the application – these are the most important aspects to delve into when speaking to both partners.
- Participants will be given a £40 shopping voucher for taking part. For telephone interviews, the partner who is interviewed will receive a voucher. For face-to-face sessions, both partners will receive a voucher. This can be a digital or paper voucher depending on their preference.

- The interviews will be recorded as well as interviewer notes in an analysis grid.
- An analysis session (2 hours) will be held after the interviews, after which a brief summary of findings will be provided.

Introduction 2-3 mins

- Thank participants for taking part. Introduce self and explain nature of interview: informal conversation; all opinions valid. Interviews should take around 45-60 minutes.
- Role of Ipsos – Independent research organisation (i.e. independent of government), we adhere to the MRS Code of Conduct.
- Introduce research and topic – The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct research among customers who are claiming benefits and have been asked to move to Universal Credit. This interview is to learn a bit about you and how you make decisions. We will be asking you some questions about how you manage your household finances, but we will not ask you for any actual figures about your income or outgoings, or for details of your spending.
- Voluntary nature of discussion: reiterate that their participation is voluntary (they can withdraw at any time during the interview). You can decide how much you would like to share with me throughout this interview as well as not to answer any questions if you prefer. Just let me know at any time if you would prefer not to answer a question and we will move on. We understand some of the topics we will be discussing are sensitive and can be personal.
- Confidentiality – reassure all responses are anonymous and that identifiable information about them will not be passed on to anyone, including back to DWP or any other government department. Inform participants that the only situation in which Ipsos might have to pass on something they tell us or that happens during an interview, or their personal details, would be if something made the interviewer seriously concerned that they, or someone else, was at serious risk of harm. Reassure them that participation will have no impact on their Universal Credit claim or any dealings with DWP now or in the future.
- Accessing support after the interview: following these interviews, we want to encourage people to access advice or support if they feel it would benefit them. We are providing everyone we speak to with an information leaflet. This includes details of organisations which can provide services relevant to the topics we will speak about today. It is not because of anything that has been or will be said, or done, that has prompted Ipsos to give you this. This is standard across the project.
- Consent – check that they are happy to take part in the interview.

- Ask for permission to digitally record – START RECORDING - GDPR requires a legal basis to process your data. Our legal basis is your consent which you are free to withdraw at any point during or after the research (up until the beginning of July 2024 - after this time the data would have been analysed and cannot be removed). Are you happy to continue?
- Confirm if they a) received a letter about the move from [current benefit] to Universal Credit i.e., the Migration Notice b) have made a claim for Universal Credit or c) received an extension to their claim

Moderator note down and ensure questions are framed around their response. Section 6 is tailored to those who have already made a UC claim or started the process, and Section 7 will be asked to those who have not yet made a claim / started the process. If they say they plan to make a claim, Section 7 questions will differ depending on whether or not they plan to claim.

- Any questions before we begin?

Background and context 5 mins

To start off with, I'd like to ask a few questions about you. **THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS**

Warm up:

Name / ask how they are / what keeps them busy

Cover briefly for both couples when interviewed in pairs:

Can you tell me a bit about yourself? Probe:

- Family and home life – who else lives with them, any other caring responsibilities. How long they have been together / been living together?
- Housing - how long they have lived in their area? In their current home?
- Work – work status for both. IF working - self-employed or employed?
- Work history – if currently working, have they always done this type of work, if not, what did they used to do, any non-working spells.
- Digital capability – what types of activities do you do online? Which devices do you use? Why these ones?
- Benefits – are they receiving any other benefit outside of [benefit claimed], together or separately?
 - How long have you been claiming [benefit/s claimed]? Record length of time.
 - What have your experiences of claiming been? Probe on what has worked well / less well?
 - How does this benefit support you?
- Jobcentre Plus – Have you ever had contact with Jobcentre Plus?

- Any changes in their lives recently? Do you expect there to be any changes in the near future? For example, moving house, having a baby, changing jobs, receiving a promotion etc.

–FOR HOUSING BENEFIT CUSTOMERS ONLY: I'd like to talk a bit about your experience with local authorities.

Local Authorities

- How did you apply for Housing Benefit – through the DWP or your Local Authority?
- Have (either of) you ever been in contact with your local authority? If yes:
 - How often are you in contact with them?
 - What type of information do you need to provide your local authority with to receive Housing Benefit?
- Have your local authority ever been in contact with (either of) you? Including about potentially needing to move to UC?

Understanding and awareness of UC 5-10 mins

Now I'd like to ask you a bit more about Universal Credit. THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

Awareness and understanding of Universal Credit more generally:

- Have (either of you) you heard of Universal Credit before?
 - If yes: Where did you hear about it? E.g. from DWP / friends & family / saw that [current benefit] was ending
- Could you please tell me in your own words what you think Universal Credit is?

I'd like to ask you about a letter the Department for Work and Pensions recently sent you about moving from [current benefit] to Universal Credit.

Awareness and understanding of Universal Credit following prompts around migration letter:

- What did you do after receiving the migration letter? Probe on: Did you both read the letter? Did you discuss it together?
- If one person hasn't read it: why is this?

MODERATOR: For the questions which follow, probe appropriately depending on if both partners have read the letter or only one.

- How did you feel about receiving this letter? Probe on: expecting to move to UC / surprised / concerned? How did you feel about both receiving a letter? If one partner did not read the letter – probe on how they felt after being told.

- How easy or difficult was it to understand the letter? If difficult: What did you do to address this / to make it easier to understand? If one partner did not read the letter – probe on how easily they understood when their partner described / explained the contents to them.
- If read letter: How comfortable did you feel communicating this information to your partner? Why is that? Probe complexity or format of information.
- Have you heard of Transitional Protection? What can you tell me about it?
- Have you received a reminder letter? If yes probe on: how they felt about receiving the reminder / what action, if any, they took after receiving the reminder

ONLY ASK ESA AND IS CUSTOMERS

- Have either of you received any calls from the Move to UC Helpline?
Prompt: These calls would have reminded you to make a claim before your migration deadline ended. If yes:
 - What was your experience of this / these call/s? Probe and take note of any differences between the couple e.g. did they both have calls? Did they discuss this?
 - What impact did they have on how you felt about claiming UC? What action did you take as a result of these calls?

Understanding how Legacy benefit customers manage finances as a couple 10 mins

Next, I'd like to talk a bit about your home life and how you make financial decisions as a couple. This will be helpful to understand the factors that might / have influence/d your decision to claim Universal Credit. Throughout – probe on both members of couple for F2F interviews and other partner for solo interviews

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY – if it seems like a particular topic is uncomfortable to discuss, move on.

Roles and Responsibilities

In terms of roles and responsibilities at home:

- Who does what in terms of responsibilities at home? Why?
- Those with children: how does childcare work in your household? Probe on use of formal / informal childcare.
- Do you get any help or support from anyone, for example other family members? What with? Probe on: financial management; childcare; household management (cleaning, cooking); paying bills.

Finance management

- How do you manage your household finances?
 - Who does what? Why? Do either of you have certain tasks or roles?

- Probe on budgeting and whether / how they do this and over what time period.
- Housing Benefit customers: How do you pay your rent/mortgage now?
 - Probe: Do you pay for this directly, or by a benefit directly to your landlord (by APA) For those who pay directly: what impact has having to pay directly had on you?
- How much effort is managing your finances? For example, administration behind it, tracking payment dates, completing forms, budgeting (if this is done), making payments etc.
 - To what extent and for what reasons? Is this the case for [current benefit] or Universal Credit? Is this done jointly or separately, and to what extent? Why is this?
 - Probe: establish whether they have a joint account or individual ones. UC CLAIMANTS ONLY: Which account does UC go to? Was [current benefit] being paid to the same account that UC is now paid to? What impact does this have on managing their finances?
- How do you feel about doing finance related tasks online? What makes you say this? For example, checking account balances, transferring money, paying bills
- Are there any other factors which influence how you manage your finances as a couple? MODERATOR: REMIND PARTICIPANTS THEY DO NOT HAVE TO SHARE ANYTHING THEY ARE NOT COMFORTABLE TALKING ABOUT. THEY WILL NOT BE ASKED TO SHARE DETAILS ON ANY AMOUNTS OF MONEY INVOLVED.
 - Debt (individual/as a couple) – credit cards, loans, other financial difficulties
 - Unexpected drops in income e.g., changes in employment, health concerns/costs
 - To what extent did these other factors influence your decision whether or not to claim UC? Are you aware how this might impact your claim?

Income and how they use their current benefit

- What would you say is your main source of income? If both work - do they consider one to be the main income earner, and who is it?
- What other sources of income do you have?
- Where does [current benefit] fit into this? Moderator to get a sense of whether these sources of income are essential vs. a nice to have/top up. Gauge level of participant reliance on [current benefit]
- Do you use [current benefit] to cover specific expenses? How do you decide this?

- Are you saving / putting money away for the future?

Discussions about finance

- How much do you discuss your finances as a couple?
- How easy or difficult is it to talk about this subject?

Understanding the impact of the move to Universal Credit 15 mins

I'd like to talk about context and how your personal circumstances as a couple might affect your decision / have affected your decision to apply for Universal Credit.

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY.
THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F
INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

Advice

- To what extent have (either of) you sought / will either of you seek advice about whether to apply for Universal Credit?
 - If no / none: why not?
 - If yes: Who did this? Probe on why this person.
 - Is / was there anything specific you were looking for advice on? Why?
 - Where did / will you look for advice or information? Or from who? Why did / would you choose these sources? Probe on: family, friends, websites, online calculators, Jobcentre Plus, DWP helpline, guidance webpages, Citizen's Advice and. Prompt specifically on: Understanding Universal Credit, GOV.UK or Move to UC websites
 - If yes: What advice did they give you?
 - Are these the same sources you would get in touch with for other types of financial information?
 - What impact did / does this advice or information have on your decision to claim? And when you made your claim?
 - Did / will you use a benefit calculator at any point? How did / will this affect your decision to claim?
- Have you communicated with DWP about to your claim or move from [current benefit]?
 - If no: why?
 - What type of situation or query would prompt you to contact them?
 - If yes: how? what was the communication about?

- If contacted the DWP helpline: How did you find the number for the DWP helpline? How was your interaction with the DWP helpline overall? What questions did you ask? Were they able to resolve them? What did you do next?
- How do you feel about the amount of communication you have had with DWP about moving to UC? What impact has this had on your (intention to) claim?

Universal Credit compared to [current benefit]

- To what extent did you discuss your decision to claim Universal Credit together? What type of things did you consider? Were you both in agreement / have a similar view?
- What do you find appealing about claiming Universal Credit compared to [current benefit]? Or is [current benefit] more appealing to Universal Credit? In what way?
 - What impact did/does this have on your decision-making about claiming UC?
- What impact did you / do you expect UC to have on your overall benefit payment amount? Probe: did they check how much they could claim/ did they / do they expect to receive the same amount as they did claiming [current benefit]? Awareness of Transitional Protection? How did they feel about this? If they expected to receive a different amount – why was this?
 - What impact did/does this have on your decision-making about claiming UC by your migration deadline/at all?

Employment status / savings

- How did / does your / your partner's employment status feed into your decision-making process to claim UC?
 - Probe specifically on when they made their claim / when they will make their claim
- (For those with savings): How did / do savings influence your decision to claim Universal Credit?
 - What did / do (both of) you know about how having savings affects a Universal Credit claim?
 - How did this affect your decision-making about claiming?
 - Are you aware of the savings exemption under the move to Universal Credit?
 - If yes: can you explain it to me in your own words? How did / does this affect your decision to claim?
- How has / would claiming Universal Credit affected your / your partner's employment, if at all?

- The hours you work/ed, how much you can earn?
- How did / do you expect UC would affect your / your partner's employment, if at all? How was / is this made clear or through what sources? Probe: Childcare costs, Savings plans/habits/goals, Future plans/goals in general, especially work-related

Other concerns / final factors

- Were / are there any concerns (either of) you had at the time of / have about making the claim? Were these shared concerns?
 - Probe the influence the above points had on the timing of their claim, if at all.
 - How did / does this impact your decision to claim? And how you discussed this as a couple?
 - Did / would any of these concerns become reality? If yes: how did this impact your claim?
- Are / were there any other factors that influence/d your decision to claim Universal Credit that we haven't discussed? Probe on couple dynamics specifically
 - Will you / have you both submit/submitted your claim? If just one says they will or have claimed: what is / was the impact of this?
 - How does / did this change your approach to making a decision, if at all?
 - Any positives? Negatives?
 - Past learnings or experiences?
- What would be / was the deciding factor for you to apply for Universal Credit, if any?
 - Why is / was this?

Understanding the UC journey among those who have already claimed / started process 15 mins

MODERATOR: ASK THIS SECTION IF ALREADY CLAIMED UC / BEGUN PROCESS OF CLAIMING UC. THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

You mentioned earlier that you have begun the process of claiming UC / already claimed UC. I'd like to ask some questions to understand the journey you took to do this.

UC Journey

- Can you talk me through the process of claiming Universal Credit, step by step for each of you?

- What did you have to do?
- How did you feel about each having to make a claim?
- How did you make your claim (probe: online, on the telephone, in the Jobcentre)
- Can you remember which one of you made the claim first and when? When was the second claim was made?
- To what extent did you help each other through the application process? Or did you do it separately? How did this work?
- Did you experience any challenges making your claim? Probe on: linking accounts? How were these challenges resolved / addressed? Probe on:
 - Making a claim online / completing the application
 - Verifying ID. For those who had to verify their ID at the Jobcentre: how did you feel about going into Jobcentre Plus to verify your ID? How did you find this experience? For each, probe on ease / difficulty and any challenges encountered.
 - Was there anything that put (either of) you off the application process initially, or prevented you from completing it? For what reasons?
 - If yes: What made you come back to it at a later stage? What do you think could be done to improve this?
- Did (either of) you have any problems in making a claim that haven't been mentioned?
- Anything that helped you make a claim? Individually or as a couple?
 - Did you apply for an advance payment of Universal Credit? Did you receive this?
 - Do you receive a Transitional Protection supplement?
- Did anything surprise you about the process?
- How did you find the information / actions needed from you to claim UC compared to [current benefit]?
 - How did you approach this? Who did what?
 - How prepared did you both feel for this? Why? Probe: if information provided by DWP was sufficient e.g., gave an accurate description of what the process would look like, how long, how many steps etc.
 - What impact did this have on when you made your claim / how quickly you were able to make your claim?

- Was one partner more prepared than the other to make a claim? For what reason? How did this affect when you made your claim? How did you overcome this as a couple?
- Were any other benefits you received affected because of your claim for Universal Credit?
 - How is this similar or different to how you expected Universal Credit to impact your eligibility for other benefits?
 - Did you seek advice or information about how you could be impacted? From who? What sources? How did you apply this? What impact did it have?
 - What impact have the work conditionality requirements of UC had on each of you? How is this different from before?

Lead Carer

- (For those with children) How did you agree the “lead carer” for the claim?
 - PROBE SENSITIVELY: Why did you choose this person? How did this affect your claim, if any?
 - How did you feel about choosing a “lead carer”?
 - How did this link to how you decided who the Universal Credit would be paid to? How did this feel for both of you?
 - Ask lead carer: How did being the lead carer impact your work requirements on Universal Credit? How do you feel about this?
 - Ask both: What impact did the lead carer’s work requirements have on your family? How do you feel about this?
- Have you decided how you will manage Universal Credit claims as a couple in the future? For example, if DWP needed further updates on your circumstances, answering any other questions from DWP etc.
 - How will this work?
 - How did you decide this?
 - How are you feeling about this?

Impact of claiming

- What impact has claiming UC had on you? Probe on: work, family life, home, wellbeing

Understanding the main barriers to UC among those who have not yet claimed or started the process 15 mins

MODERATOR: ASK THIS SECTION IF NOT YET CLAIMED UC. THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

You mentioned earlier that you haven't started the process of claiming UC. I'd like to ask some questions to understand why that is.

MODERATOR: words in bold italics are for those who haven't claimed but said they intend to. Please don't read out the words in bold italics to customers who have said they haven't claimed and don't intend to.

UC Journey

- Can you talk me through your understanding of the process of claiming Universal Credit, step by step?
- Did / have you look / looked at the application process to see what you would need to do to make a claim?
- What do you know about claiming as a couple? Probe: what impact did / does this have on your decision not to apply for UC / to apply for UC?
- Have (either of) you started the application?
- How difficult or easy did / does it seem to you to make a claim? For each partner probe:
 - Making a claim online
 - Verifying ID
- To what extent did your decision not to claim relate to the process of claiming so far?
- What is your understanding of the individual work conditionality requirements for claiming UC?
- What impact, if any, does / did this have on your decision not to claim so far?

Communication with DWP

- Have either or both of you received a termination letter?
 - If yes: tell me in your own words the key messages this letter communicated to you? How did it make you feel? What action, if any, have you taken since?

Other factors

- Was / is there anything else that influenced / has influenced your decision to delay making a Universal Credit claim as a couple?
 - Were/ are there any other factors that influenced your decision not to claim Universal Credit so far that we haven't already discussed. Probe on positives and negatives

Impact of not claiming

- What impact has not claiming had on you? Probe on: work, family life, home, wellbeing

- What have you done / do you intend to do instead?

Moderator: Do not ask the following questions to those who have already said they intend to claim in the future

- Would you consider claiming for Universal Credit in the future? Is this different / the same for each partner?
 - Is there are a particular time in the future that you would consider claiming? Why is that?
 - Probe on factors influencing this e.g. employment changes; childcare costs

Summing up 2-3 mins

We are coming to the end of the interview, but I have a few final questions before we finish.

- If there was one thing that DWP could do to best support each of you going forward, what would it be?
- If already claimed / started to claim UC: What would be the most important thing for us to feed back to DWP about your experience of Universal Credit?
- If not claimed UC: What would be the most important thing for us to feed back to DWP about Universal Credit?
- Finally, is there anything else you would like to mention that we haven't had the opportunity to discuss?

Thank and reiterate confidentiality. Incentives = a £40 e-voucher or paper voucher each as a 'thank you' from Ipsos for their time and contribution.

2.3.3 Discussion Guide - Singles Phase 2

Aims and objectives

The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct qualitative research to understand the experiences of a sample of legacy benefit customers moving onto Universal Credit.

The sample will include customers claiming the following benefits: Income Support, Housing Benefit, and Employment Support Allowance. This research aims to identify any specific challenges for this cohort in moving to UC and how these can be addressed during the Move to UC expansion.

This discussion guide is to be used in 45-minute telephone interviews.

This research aims to:

- Understand legacy benefit customers' knowledge and awareness of UC and attitudes towards it, prior to receiving the Migration Notice.
- The extent to which these legacy benefit customers understand the Move to UC process
- Understanding legacy benefit customers' journey to UC, from the point of receiving the Migration Notice onwards, either through making a claim and receiving payments, or deciding not to claim
- How customers engage with the support offered during the M2UC process, including experiences of the Enhanced Support Journey (ESJ)
- What actions legacy benefit customers are taking in response to their Migration Notice
- Why legacy customers do / do not decide to make a claim for UC
- Barriers to customers successfully making a claim for UC and how these can be addressed via improvements to the process / support offered
- Early findings for these customers and what further support they may need from DWP to successfully make a claim for UC

Interviewer information

- Fieldwork will run between 18th November 2024 – 28th February 2025.
- A minimum of 35 single customers will be interviewed.
- Participants will be given a £30 shopping voucher for taking part. This can be a digital or paper voucher depending on their preference.
- The interviews will be recorded as well as interviewer notes in an analysis grid.
- An analysis session (2 hours) will be held after the interviews, after which a brief summary of findings will be provided.
- Questions highlighted in blue are to be prioritised if pressed for time.

Introduction 2-3 mins

- Thank participants for taking part. Introduce self and explain nature of interview: informal conversation; all opinions valid. Interviews should take around 45 minutes.
- Role of Ipsos – Independent research organisation (i.e. independent of government), we adhere to the MRS Code of Conduct.
- Introduce research and topic – The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct research among customers who are claiming benefits and have been asked to move to Universal Credit. This interview is to learn about you and how you make decisions. We will be asking you some questions about how you manage your household finances, but we will not ask you for any actual figures about your income or outgoings, or for details of your spending.

- Voluntary nature of discussion: reiterate that their participation is voluntary (they can withdraw at any time during the interview). You can decide how much you would like to share with me throughout this interview as well as not to answer any questions if you prefer. Just let me know at any time if you would prefer not to answer a question and we will move on. We understand some of the topics we will be discussing are sensitive and can be personal.
- Confidentiality – reassure all responses are anonymous and that identifiable information about them will not be passed on to anyone, including back to DWP or any other government department. Inform participants that the only situation in which Ipsos might have to pass on something they tell us or that happens during an interview, or their personal details, would be if something made the interviewer seriously concerned that they, or someone else, was at serious risk of harm. Reassure them that participation will have no impact on their Universal Credit claim or any dealings with DWP now or in the future.
- Accessing support after the interview: following these interviews, we want to encourage people to access advice or support if they feel it would benefit them. We are providing everyone we speak to with an information leaflet. This includes details of organisations which can provide services relevant to the topics we will speak about today. It is not because of anything that has been or will be said, or done, that has prompted Ipsos to give you this. This is standard across the project.
- Consent – check that they are happy to take part in the interview.
- Ask for permission to digitally record – START RECORDING - GDPR requires a legal basis to process your data. Our legal basis is your consent which you are free to withdraw at any point during or after the research (up until the beginning of February 2025 - after this time the data would have been analysed and cannot be removed). Are you happy to continue?
- Confirm whether they a) received a letter about the move from [current benefit] to Universal Credit i.e., the Migration Notice b) have made a claim / started to make a claim for Universal Credit.

Moderator note down and ensure questions are framed around their response. Section 6 is tailored to those who have already made a UC claim or started the process, and Section 7 will be asked to those who have not yet made a claim / started the process. If they say they plan to make a claim, Section 7 questions will differ depending on whether or not they plan to claim.

- Any questions before we begin?

Background and context 2-3 mins (Housing Benefit 5 mins)

To start off with, I'd like to ask a few questions about you.

Warm up:

Name / ask how they are / what keeps them busy

Cover briefly:

- Can you tell me a bit about yourself? Probe:
- Family and home life – who else lives with them, any other caring responsibilities.
- Housing - how long they have lived in their area? In their current home? Do they rent or own their own home?
- Work – work status. IF working - self-employed or employed? IF – working – Part-time or Full-time?
- Benefits – are you receiving any other benefit outside of [legacy benefit claimed]?
 - How long have you been claiming [legacy benefit/s claimed]? Record length of time.
 - What have your experiences of claiming been? Probe on what has worked well / less well?
 - How does this benefit support you? Is there anything specific it goes towards?
- Any changes in their lives recently? Do you expect there to be any changes in the near future? For example, moving house, having a baby, changing jobs, receiving a promotion etc.

FOR HOUSING BENEFIT CUSTOMERS ONLY: I'd like to talk a bit about your experience with local authorities.

Local Authorities

- How did you apply for Housing Benefit – through the DWP or your Local Authority?
- Have you ever been in contact with your Local Authority whilst claiming Housing Benefit? Prompt if unsure: your Local Authority is your local council
 - If yes:
 - Did you get in contact with your Local Authority, or did your Local Authority get in contact with you?
 - How often are you in contact with them / are they in contact with you?
 - What type of information did you initially need to provide your Local Authority with to receive Housing Benefit?
 - Did you need to provide any information regularly to the Local Authority to continue receiving Housing Benefit? If yes, what type of information did they request you to provide?
- Were you expecting to receive support from your Local Authority with the move to UC?
 - IF YES: what kinds of support were you expecting to receive?

- Did you receive any support from your Local Authority with the move to UC?
 - How did you get this support? Did you ask for it or was it offered to you?
 - What kinds of support did you receive from your Local Authority? PROBE: Advice? Referrals to DWP helplines? Referrals to external organisations
 - Did the support you received meet your expectations?

FOR ALL PARTICIPANTS:

- Migration Notice: When were you asked to move onto UC? Interviewer to observe awareness and general understanding of UC

Understanding and awareness of UC 5-10 mins

Now I'd like to ask you a bit more about Universal Credit.

Awareness and understanding of Universal Credit more generally:

- Where did you hear about Universal Credit? E.g. from DWP / friends & family / saw that [current benefit] was ending
- Could you please tell me in your own words what you think Universal Credit is?

I'd like to ask you about a letter the Department for Work and Pensions recently sent you about moving from [current benefit] to Universal Credit.

Awareness and understanding of Universal Credit following prompts around migration letter:

- Can you tell me in own words what you need to do to claim Universal Credit?
- How did you feel about receiving this letter? Probe on: expecting to move to UC / surprised / concerned?
- How easy or difficult was it to understand the letter?
- PROBES for those who found the letter difficult to understand / confusing:
 - What did you find difficult to understand in the letter?
 - What other support would have helped you to understand the letter? Probe on: someone to help you read or understand the letter (friend / family member / support worker / carer / organisation)
- Have you heard of Transitional Protection? If participant is unsure, please explain TP: In the Migration Notice, transitional protection is described as a top up that customers may be eligible for if the amount, they are entitled to on their existing benefits is more than they would receive on Universal Credit.
 - IF YES] Can you tell me in your own words what Transitional Protection is? Where did you hear about Transitional Protection? Probe: Migration Letter? Migration Notice Helpline? Family and/or Friends?

- Have you received a reminder letter? If yes probe on: how they felt about receiving the reminder / what action, if any, they took after receiving the reminder
- Have you received any text messages reminding you to move to UC? If yes probe on: how they felt about receiving the reminder / what action, if any, they took after receiving the reminder.
- Can you tell me in own words what would happen if you didn't claim UC before the migration deadline?

Enhanced support journey

ASK THOSE WHO ARE / WERE CLAIMING INCOME SUPPORT AND/OR ESA

- Have you received any calls from the Move to UC Helpline? Prompt: These were calls from the DWP that reminded you to make a claim before your migration deadline ended.

[IF NO – SKIP TO VISITING OFFICER SECTION]

IF RECEIVED CALLS:

- How often were you contacted?
- How long roughly was/were the call/s?
- What was your experience of this / these call/s? PROBE: Was/were the call/s helpful? What was the purpose of the call/s?
- Did this / these call /s change how you felt about claiming UC? What action did you take after this/these call/s?
- Did you tell the caller from DWP that you intended to claim Universal Credit? If yes: were you contacted again after?
- Were you offered support with the transition? If yes: What types of support were you offered? Probe: Phone claim? Extension to the migration deadline? Visit from a visiting officer? Support making an online claim? Through which channels (e.g. telephone)?
 - Did you have enough time to consider your support needs on the call? How do you feel about talking about your support needs with the caller?
 - If yes: What actions were taken by DWP to meet these support needs? Were these actions helpful?
 - Were you offered any in-person support by the caller / did you request any in-person support? Did you receive this in-person support?

VISITING OFFICER SECTION:

- Did you feel that you needed in-person support to complete your claim?
- Did you receive a visit from a visiting officer? IF NO – SKIP TO DEADLINE EXTENSION SECTION]

- If yes:
 - What was your experience of this visit? Did you find it helpful / unhelpful?
 - If unhelpful: What would have made it more helpful?
- DEADLINE EXTENSION: Was your deadline to move to UC extended?
 Prompt if unsure: You usually have 3 months to claim UC after receiving your Migration Notice, an extension would have given you an extra month to claim.
 [IF NO – SKIP TO SECTION 4]
- If yes:
 - By how long? Were you aware that your deadline had been extended? How did you know this?
 - How did you feel about receiving an extension? PROBE: Did you feel the extension provided/would have provided enough time to make a claim?

Understanding how Legacy benefit customers manage finances 5 mins

Next, I'd like to talk a bit about your home life and how you make financial decisions. This will be helpful to understand the factors that might / have influence/d your decision whether to claim Universal Credit.

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY – if it seems like a particular topic is uncomfortable to discuss, move on.

Digital capability

- How confident do you feel about doing finance related tasks online, such as paying bills and online banking?
- How does / did this impact your decision to claim UC?
- If not very confident: What kind of support would help you feel more confident to do finance related tasks online?

Finance management

- Housing Benefit customers: How do you pay your rent/mortgage now?
 - Probe: Do you pay for this directly, or by a benefit directly to your landlord (by APA) For those who pay directly: what impact has having to pay directly had on you?

Income and how they use their current benefit

- What would you say is your main source of income?
- Where does [current benefit] fit into this? Moderator to get a sense of whether these sources of income are essential vs. a nice to have/top up. Gauge level of participant reliance on [current benefit]

- Do you use [current benefit] to cover specific expenses? How do you decide this?

Financial decisions

- To what extent do you seek advice when making financial decisions? For example, getting a loan, paying off debt etc.
 - If none: why not? Is there anything that puts you off? Or prevents you?
 - If yes: Where do you look for advice or from who? What makes you choose these sources? E.g., family, friends, via telephone, websites, online calculators, GOV.UK website. Third party: Citizens Advice, other charities.
- What types of financial decisions do you feel advice/information is needed for (versus relying on your own knowledge)? Why? How do you use different sources of information?
- What kind of impact does this advice or information have on your financial decisions?

Understanding the impact of the move to Universal Credit 10-15 mins

Let's move on, I'd like to talk about context and how your personal circumstances might affect your decision / how they have affected your decision to apply for Universal Credit.

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY

Advice

- To what extent did you / do you plan to seek advice about whether to apply for Universal Credit?
 - If no / none: why not?
 - If yes: Where did / do you plan to look for advice or information? Or from who? Why did / would you choose these sources? E.g., family, friends, websites, online calculators, Jobcentre Plus, DWP helpline, guidance webpages, Citizen's Advice and Understanding Universal Credit, GOV.UK website.
 - What advice did they give you?
 - If contacted the DWP helpline: How was your interaction with the DWP helpline? What advice did they give you? Did you call the Migration Notice helpline or the Universal Credit helpline? If participant is unsure please explain the difference: "The Migration Notice helpline is on the migration letter and is a designed to support with Move to UC queries (0800 169 0328). The number should be on the GOV.UK Move to UC Guidance page. If you called this helpline, you would have been provided with two options (one for Tax Credit customers and one for Legacy Benefit customers). The UC Helpline (0800 328 5644) is for general UC queries and is found on the Universal Credit GOV.UK

webpage. If you called this helpline, you would have been provided with numerous options including one for UC claimants who require support with the benefit and one to make a UC claim.”

- What impact did / has this advice or information have on your decision to claim? And when you made your claim?
- Did / will you use a benefit calculator at any point? How did / will this affect your decision to claim?

Universal Credit compared to [current benefit]

- How do you think moving from [current benefit] to Universal Credit might / has affect/ed you?
 - What would you say are the main differences between Universal Credit and your [current benefit]? What impact did/does this have on your decision-making about claiming UC?
 - If the impact of moving onto UC on council tax payment is mentioned: Did you discuss this with anyone? Probe: M2UC helpline, Local Authority, JCP. If so, what was your experience of this interaction? When did you realise it had been affected? Probe: before or after making a claim, whilst thinking about making a claim? Did it impact your decision to claim at all?
- What impact did you / do you expect UC to have on your overall benefit payment amount?
- Did you check how much you could claim? Did / do you expect to receive the same amount as you did claiming [current benefit]?
 - What impact did/does this have on your decision-making about claiming UC by your migration deadline/at all?
- (For those with savings): How did / do savings influence your decision to claim Universal Credit?
 - What did / do you know about how having savings affects a Universal Credit claim?
 - How did this affect your decision-making about claiming?
 - Are you aware of the savings exemption under the move to Universal Credit?
 - If yes: can you explain it to me in your own words? How did / does this affect your decision to claim?

Employment status

- How did / does your employment status feed into your decision-making process to claim UC? Probe specifically on when they made their claim / when they will make their claim

- How has / would claiming Universal Credit affected your employment, if at all?
 - The hours you work/ed, how much you can earn?
 - How did / do you expect UC affect/would affect your employment, if at all? How was / is this made clear or through what sources? Probe: Childcare costs, Savings plans/habits/goals, Future plans/goals in general, especially work-related

Other concerns / final factors

- Were / are there any concerns you had at the time of / have about making the claim?
 - Probe the influence the above points had on the timing of their claim, if at all.
 - How did / does this impact your decision to claim?
 - Did / would any of these concerns become reality? If yes: how did this impact your claim?
- Were / are there any other factors that influence/d your decision to claim Universal Credit that we haven't discussed?
 - How did / does this change your approach to making a decision, if at all?
 - Any positives? Negatives?
 - Past learnings or experiences?
- What information would have been/would be most important / helpful for you to know about moving to Universal Credit? What would be / was the deciding factor for you to apply for Universal Credit, if any?
 - Why is / was this?

Understanding the UC journey among those who have already claimed / started process 10-15 mins

MODERATOR: ASK THIS SECTION IF ALREADY CLAIMED UC / BEGUN PROCESS OF CLAIMING UC

You mentioned earlier that you have begun the process of claiming UC / already claimed UC. I'd like to ask some questions to understand the journey you took to do this.

- What prompted you to start making your claim?
 - (If they mention any of the following: M2UC call, migration deadline approaching, extension deadline) Why did that prompt you to make a claim?

UC Journey

- Can you talk me through the process of claiming Universal Credit, step by step?
 - What did you have to do?
- How did you make your claim? Was it only over the phone, in the Jobcentre, only online or a mix of both?
- How easy / difficult did you find making the claim online / over the phone?
 - If difficult: What would have made the process easier?
 - How long did it take to complete the application online / over the phone?
 - Did you receive any help to make the claim? PROBE: friend / family member / support worker / carer / organisation

IF ONLINE:

- Were there any questions in / parts of the form that you found easy / difficult to answer?
- How did submitting the claim online compare to other things you do online e.g. online banking, shopping, etc?
- What was your overall experience of making the claim online?

IF OVER THE PHONE:

- Why did you choose to make a UC phone claim?
- What steps did you have to take to set up the phone claim? Probe: Call the UC Telephony line? Receive a call from the helpline?
- Did you feel comfortable sharing personal and financial information over the phone? What was your overall experience of making the claim over the telephone?
- How did you find the process overall?
- How did you verify your ID? Probe: Jobcentre Plus office? At home?
 - Verifying ID. For those who had to verify their ID at the Jobcentre: how did you feel about going into Jobcentre Plus to verify your ID? How did you find this experience?
 - For those who had their ID verified at home: How did you find this experience? Was it straightforward or not? What information were you provided prior to the appointment? Did you experience any problems verifying your ID?
 - For any customer who had an ID appointment: What information were you asked for in your ID appointment? How did you feel about providing that information? How did you find getting a hold of this information? Did you need to submit any evidence to the journal? Was there

anything that put you off the application process initially, or prevented you from completing it? For what reasons?

- If yes: What made you come back to it at a later stage? What do you think could be done to improve this?
- Did you have any problems in making a claim that haven't been mentioned?
- Anything that helped you make a claim?
 - Did you apply for an advance payment of Universal Credit? Did you receive this?
 - Did you receive a Transitional Protection supplement? If participant is unsure, please explain TP: In the Migration Notice, transitional protection is described as a top up that customers may be eligible for if the amount, they are entitled to on their existing benefits is more than they would receive on Universal Credit. If yes: Were you aware that you would receive TP prior to claiming? Did this have any impact on your decision to claim?
- Did anything surprise you about the process?
- How did you find the input needed from you to claim UC compared to [legacy benefit]?
 - How did you approach this?
 - How prepared did you feel for this level of involvement? Why? Probe: if information provided by DWP was sufficient e.g., gave an accurate description of what the process would look like, how long, how many steps etc.
 - What impact did this have on when you made your claim / how quickly you were able to make your claim?
- Were any other benefits you received affected because of your claim for Universal Credit?
 - How is this similar or different to how you expected Universal Credit to impact your eligibility for other benefits
 - Did you seek advice or information about how you could be impacted? From who? What sources? How did you apply this? What impact did it have?
- What impact have the work conditionality requirements of UC had on you? How is this different from before?

Communication with DWP

- Have you communicated with DWP about your claim or move from [current benefit]?
 - If no: why?

- What would your preferred way be to communicate with DWP? E.g., online, telephone, face-to-face, video calls. Why is this?
- What type of situation or query would prompt you to contact them?
- (f yes: what was the communication about?
 - How did you find this experience? What made it a positive or negative one? Probe on staff interaction specifically.

Understanding the main barriers to UC among those who have not yet claimed or started the process 10-15 mins

MODERATOR: ASK THIS SECTION IF NOT YET CLAIMED UC

You mentioned earlier that you haven't started the process of claiming UC. I'd like to ask some questions to understand why that is.

MODERATOR: words in bold italics are for those who haven't claimed but said they intend to. Please don't read out the words in bold italics to customers who have said they haven't claimed and don't intend to.

UC Journey

- Can you talk me through your understanding of the process of claiming Universal Credit, step by step?
 - Did / have you look / looked at the application process to see what you would need to do to make a claim?
 - Have you started the application?
 - How difficult or easy did / does it seem to you to make a claim? Probe: Making a claim online, Verifying ID
 - To what extent did your decision not to claim relate to the process of claiming so far?
- What is your understanding of the individual work conditionality requirements for claiming UC?
 - What impact, if any, does / did this have on your decision not to claim so far?
- Was / is there anything else that has influenced your decision to delay making a Universal Credit claim?
 - Were / are there any other factors that influenced / has influenced your decision not to claim Universal Credit so far that we haven't already discussed. Probe on positives and negatives

Communication with DWP

- Have you received a termination letter? If yes: tell me in your own words the key messages this letter communicated to you? How did it make you feel? What action, if any, have you taken since?

Impact of not claiming

- What impact has not claiming had on your financial situation?
- Have you done anything to make up the difference in income?
- Has not claiming had any other impacts on you? Probe on: work, family life, home, wellbeing

Moderator: Do not ask the following questions to those who have already said they intend to claim in the future

- Would you consider claiming for Universal Credit in the future?
 - Is there are a particular time in the future that you would consider claiming? Why is that?
 - Probe on factors influencing this e.g. employment changes; childcare costs

Summing up 2-3 mins

We are coming to the end of the interview, but I have a few final questions before we finish.

- If there was one thing that DWP could do to best support you going forward what would it be?
- If already claimed / started to claim UC: What would be the most important thing for us to feed back to DWP about your experience of Universal Credit?
- If not claimed UC: What would be the most important thing for us to feed back to DWP about Universal Credit?
- Finally, is there anything else you would like to mention that we haven't had the opportunity to discuss?

Thank and reiterate confidentiality. Incentives = a £30 e-voucher or paper voucher each as a 'thank you' from Ipsos for their time and contribution

2.3.4 Discussion Guide - Couples Phase 2

Aims and objectives

The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct qualitative research to understand the experiences of a sample of legacy benefit customers in the move to Universal Credit.

The sample will include customers claiming the following benefits: Income Support, Housing Benefit, and Employment Support Allowance. This research aims to identify any specific challenges for this cohort in moving to UC and how these can be addressed during the Move to UC expansion.

This discussion guide is to be used in 45-minute telephone or 60-minute face to face interviews.

This research needs to explore:

- Customers' knowledge and awareness of UC and attitudes towards it, prior to receiving the Migration Notice amongst this group of legacy benefit customers
- The extent to which these legacy benefit customers understand the Move to UC process
- Legacy benefit customers' journey to UC, from the point of receiving the Migration Notice onwards, either through making a claim and receiving payments, or deciding not to claim
- How customers engage with the support offered during the M2UC process, including experiences of the Enhanced Support Journey (ESJ)
- The actions legacy benefit customers are taking in response to their Migration Notice
- Why legacy customers decide to / not to make a claim for UC
- Barriers to customers successfully making a claim for UC and how these can be addressed via improvements to the process / support offered
- Early findings for these customers and what further support they may need from DWP to successfully make a claim for UC
- Couple dynamics and how these feed into their financial decision-making processes, particularly in relation to moving to Universal Credit.

Interviewer information

- Fieldwork will run between 18th November 2024 – 28th February 2025
- A minimum of 35 couple customers will be interviewed. 6 of these will be face to face, where both partners will be present for the interview. The remaining interviews will be held over the telephone with one partner from the couple.
- For F2F interviews where both partners are being interviewed, please probe both members throughout and prioritise the questions around couple dynamics / differences and how they make decisions together / went through the application process together – these are the most important aspects to delve into when speaking to both partners.
- Participants will be given a £30 shopping voucher for taking part. For telephone interviews, the partner who is interviewed will receive a voucher. For face-to-face sessions, both partners will receive a voucher. This can be a digital or paper voucher depending on their preference.
- The interviews will be recorded as well as interviewer notes in an analysis grid.
- An analysis session (2 hours) will be held after the interviews, after which a brief summary of findings will be provided.
- Questions highlighted in blue are to be prioritised if pressed for time.

Introduction 2-3 mins

- Thank participants for taking part. Introduce self and explain nature of interview: informal conversation; all opinions valid. Interviews should take around 45 minutes (telephone)/60 minutes (f2f).
- Role of Ipsos – Independent research organisation (i.e. independent of government), we adhere to the MRS Code of Conduct.
- Introduce research and topic – The Department for Work and Pensions (DWP) has commissioned Ipsos to conduct research among customers who are claiming benefits and have been asked to move to Universal Credit. This interview is to learn about you and how you make decisions. We will be asking you some questions about how you manage your household finances, but we will not ask you for any actual figures about your income or outgoings, or for details of your spending.
- Voluntary nature of discussion: reiterate that their participation is voluntary (they can withdraw at any time during the interview). You can decide how much you would like to share with me throughout this interview as well as not to answer any questions if you prefer. Just let me know at any time if you would prefer not to answer a question and we will move on. We understand some of the topics we will be discussing are sensitive and can be personal.
- Confidentiality – reassure all responses are anonymous and that identifiable information about them will not be passed on to anyone, including back to DWP or any other government department. Inform participants that the only situation in which Ipsos might have to pass on something they tell us or that happens during an interview, or their personal details, would be if something made the interviewer seriously concerned that they, or someone else, was at serious risk of harm. Reassure them that participation will have no impact on their Universal Credit claim or any dealings with DWP now or in the future.
- Accessing support after the interview: following these interviews, we want to encourage people to access advice or support if they feel it would benefit them. We are providing everyone we speak to with an information leaflet. This includes details of organisations which can provide services relevant to the topics we will speak about today. It is not because of anything that has been or will be said, or done, that has prompted Ipsos to give you this. This is standard across the project.
- Consent – check that they are happy to take part in the interview.
- Ask for permission to digitally record – **START RECORDING** - GDPR requires a legal basis to process your data. Our legal basis is your consent which you are free to withdraw at any point during or after the research (up until the beginning of February 2025 - after this time the data would have been analysed and cannot be removed). Are you happy to continue?

- Confirm whether they a) received a letter about the move from [current benefit] to Universal Credit i.e., the Migration Notice b) have made a claim / started to make a claim for Universal Credit
- Moderator note down and ensure questions are framed around their response. Section 6 is tailored to those who have already made a UC claim or started the process, and Section 7 will be asked to those who have not yet made a claim / started the process. If they say they plan to make a claim, Section 7 questions will differ depending on whether or not they plan to claim.
- Any questions before we begin?

Background and context 2-3 mins (Housing Benefit 5 mins)

To start off with, I'd like to ask a few questions about you. **THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS**

Warm up:

Name / ask how they are / what keeps them busy

Cover briefly for both couples when interviewed in pairs:

- Can you tell me a bit about yourself? Probe:
- Family and home life – who else lives with them, any other caring responsibilities. How long they have been together / been living together?
 - Housing - how long they have lived in their area? In their current home? Do they rent or own their home?
- Work – work status for both. IF working - self-employed or employed? IF – working – Part-time or Full-time?
- Benefits – are they receiving any other benefit outside of [legacy benefit claimed], together or separately?
 - How long have you been claiming [legacy benefit/s claimed]? Record length of time.
 - What have your experiences of claiming been? Probe on what has worked well / less well?
 - How does this benefit support you?
- Any changes in their lives recently? Do you expect there to be any changes in the near future? For example, moving house, having a baby, changing jobs, receiving a promotion etc.

FOR HOUSING BENEFIT CUSTOMERS ONLY: I'd like to talk a bit about your experience with local authorities.

Local Authorities

- How did you apply for Housing Benefit – through the DWP or your Local Authority?

- Have either of you ever been in contact with your Local Authority whilst claiming Housing Benefit? Prompt if unsure: your Local Authority is your local council.
- If yes:
 - Did you get in contact with your Local Authority, or did your Local Authority get in contact with you?
 - How often are you in contact with them / are they in contact with you?
 - What type of information did you initially need to provide your Local Authority with to receive Housing Benefit?
 - Did you need to provide any information regularly to the Local Authority to continue receiving Housing Benefit? If yes, what type of information did they request that you provide?
- Were you expecting to receive support to Move to UC from your Local Authority?
 - IF YES: what kinds of support were you expecting to receive?
- Did either of you receive any support from your Local Authority with the move to UC?
 - How did you get this support? Did you ask for it or was it offered to you?
 - What kinds of support did you receive from your Local Authority? PROBE: Advice? Referrals to DWP helplines? Referrals to external organisations?
 - Did the support you received meet your expectations?

FOR ALL PARTICIPANTS:

- Migration Notice: When were you asked to move onto UC? Interviewer to observe awareness and general understanding of UC

Understanding and awareness of UC 5-10 mins

Now I'd like to ask you a bit more about Universal Credit. THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

Awareness and understanding of Universal Credit more generally:

- Where did you hear about Universal Credit? Probe but do not prompt on: from DWP / friends & family / saw that [current benefit] was ending
- Could you please tell me in your own words what you think Universal Credit is?

I'd like to ask you about a letter the Department for Work and Pensions recently sent you about moving from [current benefit] to Universal Credit.

Awareness and understanding of Universal Credit following prompts around migration letter:

- Can you tell me in own words what you need to do to claim Universal Credit?
- How did you feel about receiving this letter? Probe on: expecting to move to UC / surprised / concerned? How did you feel about both receiving a letter? If one partner did not read the letter – probe on how they felt after being told.
- How easy or difficult was it to understand the letter? If difficult: What did you do to address this / to make it easier to understand? If one partner did not read the letter – probe on how easily they understood when their partner described / explained the contents to them.
- PROBES if one / both partner/s found the letter difficult to understand / confusing:
 - What specifically did you/your partner/both of you find difficult to understand in the letter?
 - What would have helped you to understand the letter?
 - What other support would have helped you to understand the letter? Probe on: support from someone to read / understand the letter, any other forms of support.
- If read letter: How comfortable did you feel communicating this information to your partner? Why is that? Probe complexity or format of information
- Have you heard of Transitional Protection? If participant is unsure, please explain TP: In the Migration Notice, transitional protection is described as a top up that customers may be eligible for if the amount, they are entitled to on their existing benefits is more than they would receive on Universal Credit.
 - [IF YES] Can you tell me in your own words what Transitional Protection is? Where did you hear about Transitional Protection? Probe: Migration Letter? Migration Notice Helpline? Family and/or Friends?
- Have you received a reminder letter? If yes probe on: how they felt about receiving the reminder / what action, if any, they took after receiving the reminder.
- Have you received any text messages reminding you to move to UC? If yes probe on: how they felt about receiving the reminder / what action, if any, they took after receiving the reminder.
- Can you tell me in own words what would happen if you didn't claim UC before the migration deadline?

Enhanced support journey

ASK THOSE WHO ARE / WERE CLAIMING INCOME SUPPORT AND / OR ESA

- Have either of you received any calls from the Move to UC Helpline? Prompt: These were calls from the DWP that reminded you to make a claim before your migration deadline ended.

[IF NO – SKIP TO VISITING OFFICER SECTION]

IF RECEIVED CALLS:

- How often were you/your partner contacted?
- How long roughly was/were the call/s?
- What was your experience of this / these call/s? Probe and take note of any differences between the couple e.g. did they both have calls? Did they discuss this?
- PROBE: Was/were the call/s helpful? What was the purpose of the call/s?
- Did this / these call /s change how you felt about claiming UC? What action did you take after this/these call/s?
- Did either of you tell the caller from DWP that you intended to claim Universal Credit? If yes: were you contacted again after?
- Were either of you offered support with the transition to UC?
 - If yes: What types of support were you/your partner offered? Probe: Phone claim? Extension to the migration deadline? Visit from a visiting officer? Support making an online claim? Through which channels (e.g. telephone)?
 - Did you have enough time to consider your support needs on the call? How do you feel about talking about your support needs with the caller?
 - If yes: What actions were taken by DWP to meet these support needs? Were these actions helpful?
 - Were you offered any in-person support by the caller / did you request any in-person support? Did you receive this in-person support?

VISITING OFFICER SECTION:

- Did you feel that you needed in-person support to complete your claim?
- Did you receive a visit from a visiting officer? IF NO – SKIP TO DEADLINE EXTENSION SECTION] If yes:
 - What was your experience of this visit? Did you find it helpful / unhelpful?
 - If unhelpful: What would have made it more helpful?

- **DEADLINE EXTENSION:** Was your deadline to move to UC extended?
Prompt if unsure: You usually have 3 months to claim UC after receiving your Migration Notice, an extension would have given you an extra month to claim.

[IF NO – SKIP TO SECTION 4]

- If yes:
- By how long? Were you aware that your deadline had been extended? How did you know this?
- How did you feel about receiving an extension? PROBE: Did you feel the extension provided/would have provided enough time to make a claim?

Understanding how Legacy benefit customers manage finances as a couple 5-10 mins

Next, I'd like to talk a bit about your home life and how you make financial decisions as a couple. This will be helpful to understand the factors that might / have influence/d your decision to claim Universal Credit. Throughout – probe on both members of couple for F2F interviews and other partner for solo interviews

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY – if it seems like a particular topic is uncomfortable to discuss, move on.

Roles and Responsibilities

In terms of roles and responsibilities at home:

- Who does what in terms of responsibilities at home? Why?
- Those with children: how does childcare work in your household? Probe on use of formal / informal childcare.
- Do you get any help or support from anyone, for example other family members? What with? Probe on: financial management; childcare; household management (cleaning, cooking); paying bills.

Discussions about finance

- How much do you discuss your finances as a couple?
- How easy or difficult is it to talk about this subject?

Digital capability

- How confident do you feel about doing finance related tasks online, such as paying bills and online banking?
- How does / did this affect your decision to claim UC?
- If not very confident: What kind of support would help you feel more confident to do finance related tasks online?

Finance management

- Housing Benefit customers: How do you pay your rent/mortgage now?
 - Probe: Do you pay for this directly, or by a benefit directly to your landlord (by APA) For those who pay directly: what impact has having to pay directly had on you?

Income and how they use their current benefit

- What would you say is your main source of income? If both work - do they consider one to be the main income earner, and who is it?
- Where does [current benefit] fit into this? Moderator to get a sense of whether these sources of income are essential vs. a nice to have/top up. Gauge level of participant reliance on [current benefit]
- Do you use [current benefit] to cover specific expenses? How do you decide this?

Financial decisions

- To what extent do you seek advice when making financial decisions? For example, getting a loan, paying off debt etc.
 - If none: why not? Is there anything that puts you off? Or prevents you?
 - If yes: Where do you look for advice or from who? What makes you choose these sources? E.g., family, friends, via telephone, websites, online calculators, GOV.UK website. Third party: Citizens Advice, other charities.
- What types of financial decisions do you feel advice/information is needed for (versus relying on your own knowledge)? Why? How do you use different sources of information?
- What kind of impact does this advice or information have on your financial decisions?

Understanding the impact of the move to Universal Credit 10-15 mins

I'd like to talk about context and how your personal circumstances as a couple might affect your decision / have affected your decision to apply for Universal Credit.

MODERATOR: THIS SECTION SHOULD BE PROBED SENSITIVELY. THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

Advice

- To what extent have (either of) you sought / will either of you seek advice about whether to apply for Universal Credit?
 - If no / none: why not?
 - If yes: Who did this? Probe on why this person.

- Was/Is there anything specific you were/are expecting to looking/look for advice on? Why?
- Where did / will you look for advice or information? Or from who? Why did / would you choose these sources? Probe on: family, friends, websites, online calculators, Jobcentre Plus, DWP helpline, guidance webpages, Citizen's Advice and. Prompt specifically on: Understanding Universal Credit, GOV.UK
- What advice did they give you?
- If contacted the DWP helpline: How was your interaction with the DWP helpline? Did you call the Migration Notice helpline or the Universal Credit helpline? If participant is unsure please explain the difference: "The Migration Notice helpline is on the migration letter and is a designed to support with Move to UC queries (0800 169 0328). The number should be on the GOV.UK Move to UC Guidance page. If you called this helpline, you would have been provided with two options (one for Tax Credit customers and one for Legacy Benefit customers). The UC Helpline (0800 328 5644) is for general UC queries and is found on the Universal Credit GOV.UK webpage. If you called this helpline, you would have been provided with numerous options including one for UC claimants who require support with the benefit and one to make a UC claim."
 - What impact did / does this advice or information have on your decision to claim? And when you made your claim?
 - Did / will you use a benefit calculator at any point? How did / will this affect your decision to claim?

Universal Credit compared to [current benefit]

- To what extent did you discuss your decision to claim Universal Credit together? What type of things did you consider? Were you both in agreement / have a similar view?
- How do you think moving from [current benefit] to Universal Credit might /hasaffect/ed you?
 - What would you say are the main differences between Universal Credit and your [current benefit]? What impact did/does this have on your decision-making about claiming UC?
 - If the impact of moving onto UC on council tax payment is mentioned: Did you or your partner discuss this with anyone? Probe: M2UC helpline, Local Authority, JCP. If so, what was your experience of this interaction? When did you realise it had been affected? Probe: before or after making a claim, whilst thinking about making a claim? Did it impact your decision to claim at all?

- What impact did you / do you expect UC to have on your overall benefit payment amount? Probe on whether this was the same as / more / less than on current benefit.
- Did you check how much you would be likely to receive from UC? Probe on: Awareness of Transitional Protection? How did they feel about this? If they expected to receive a different amount – why was this?
 - What impact did/does this have on your decision-making about claiming UC by your migration deadline/at all?
- (For those with savings): How did / do savings influence your decision to claim Universal Credit?
 - What did / do you know about how having savings affects a Universal Credit claim?
 - How did this affect your decision-making about claiming?
 - Are you aware of the savings exemption under the move to Universal Credit?
 - If yes: can you explain it to me in your own words? How did / does this affect your decision to claim?

Employment status

- How did / does your / your partner's employment status feed into your decision-making process to claim UC?
 - Probe specifically on when they made their claim / when they will make their claim
- How has / would claiming Universal Credit affected your / your partner's employment, if at all?
 - The hours you work/ed, how much you can earn?
 - How did / do you expect UC would affect your / your partner's employment, if at all? How was / is this made clear or through what sources? Probe: Childcare costs, Savings plans/habits/goals, Future plans/goals in general, especially work-related

Other concerns / final factors

- Were / are there any concerns (either of) you had at the time of / have about making the claim? Were these shared concerns?
 - Probe the influence the above points had on the timing of their claim, if at all.
 - How did / does this impact your decision to claim? And how you discussed this as a couple?

- Did / would any of these concerns become reality? If yes: how did this impact your claim?
- Were / are there any other factors that influence/d your decision to claim Universal Credit that we haven't discussed? Probe on couple dynamics specifically
 - Have you / will you both submit/submitted your claim? If just one says they will or have claimed: what is / was the impact of this?
 - How does / did this change your approach to making a decision, if at all?
 - Any positives? Negatives?
 - Past learnings or experiences?
- What information would be most important / helpful for you to know about moving to Universal Credit?
- What would be / was the deciding factor for you to apply for Universal Credit, if any?
 - Why is / was this?

Understanding the UC journey among those who have already claimed / started process 10-15 mins

MODERATOR: ASK THIS SECTION IF ALREADY CLAIMED UC / BEGUN PROCESS OF CLAIMING UC. THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

You mentioned earlier that you have begun the process of claiming UC / already claimed UC. I'd like to ask some questions to understand the journey you took to do this.

- What prompted you to start making your claim?
 - (If they mention any of the following: M2UC call, migration deadline approaching, extension deadline) Why did that prompt you to make a claim?

UC Journey

- Can you talk me through the process of claiming Universal Credit, step by step for each of you?
 - What did you have to do?
- How did you make your claim? Was it only over the phone, in the Jobcentre, only online or a mix of both?
- How easy / difficult did you find making the claim online / over the phone?
 - If difficult: What would have made the process easier?

- How long did it take to complete the application online / over the phone?
- Did you receive any help to make the claim? PROBE: friend / family member / support worker / carer / organisation

IF ONLINE:

- Were there any questions in / parts of the form that you found easy / difficult to answer?
- How did submitting the claim online compare to other things you do online e.g. online banking, shopping, etc?
- What was your overall experience of making the claim online?

IF OVER THE PHONE:

- Why did you choose to make a UC phone claim?
- What steps did you have to take to set up the phone claim? Probe: Call the UC Telephony line? Receive a call from the helpline?
- Did you feel comfortable sharing personal and financial information over the phone?
- What was your overall experience of making the claim over the telephone?
- How did you feel about both having to make a claim?
- Can you remember which one of you made the claim first and when? When was the second claim was made?
- To what extent did you help each other through the application process? Or did you do it separately? How did this work?
- Did you experience any challenges making your claim? Probe on: linking accounts? How were these challenges resolved / addressed?
- How did you find the claim process overall?
 - How did you verify your ID? Probe: Jobcentre Plus office? At home?
 - Verifying ID. For those who had to verify their ID at the Jobcentre: how did you feel about going into Jobcentre Plus to verify your ID? How did you find this experience? Did you experience any problems verifying your ID? For each, probe on ease / difficulty and any challenges encountered.
 - For those who had their ID verified at home: How did you find this experience? Was it straightforward or not? What information were you provided prior to the appointment? Did you experience any problems verifying your ID?
- For any customer who had an ID appointment: What information were you asked for in your ID appointment? How did you feel about providing that

information? How did you find getting a hold of this information? Did you need to submit any evidence to the journal?

- Was there anything that put (either of) you off the application process initially, or prevented you from completing it? For what reasons?
 - If yes: What made you come back to it at a later stage? What do you think could be done to improve this?
- Did (either of) you have any problems in making a claim that haven't been mentioned?
- Anything that helped you make a claim? Individually or as a couple?
 - Did you apply for an advance payment of Universal Credit? Did you receive this?
 - Do you receive a Transitional Protection supplement? If participant is unsure, please explain TP: In the Migration Notice, transitional protection is described as a top up that customers may be eligible for if the amount, they are entitled to on their existing benefits is more than they would receive on Universal Credit.
- Did anything surprise you about the process?
- How did you find the information / actions needed from you to claim UC compared to [legacy benefit]?
 - How did you approach this? Who did what
 - How prepared did you both feel for this? Why? Probe: if information provided by DWP was sufficient e.g., gave an accurate description of what the process would look like, how long, how many steps etc.
 - What impact did this have on when you made your claim / how quickly you were able to make your claim?
 - Was one partner more prepared than the other to make a claim? For what reason? How did this affect when you made your claim? How did you overcome this as a couple?
- Were any other benefits you received affected because of your claim for Universal Credit?
- How is this similar or different to how you expected Universal Credit to impact your eligibility for other benefits?
 - Did you seek advice or information about how you could be impacted? From who? What sources? How did you apply this? What impact did it have?
- What impact have the work conditionality requirements of UC had on each of you? How is this different from before?

Communication with DWP

- Have either of you communicated with DWP about to your claim or move from [current benefit]?
 - If no: why?
 - What would your preferred way be to communicate with DWP? E.g., online, telephone, face-to-face, video calls. Why is this?
 - What type of situation or query would prompt you to contact them?
 - If yes: what was the communication about?
 - How did you find this experience? What made it a positive or negative one? Probe on staff interaction specifically.

Lead Carer

- (For those with children) How did you agree the “lead carer” for the claim?
 - PROBE SENSITIVELY: Why did you choose this person? How did this affect your claim, if any?
 - How did you feel about choosing a “lead carer”?
 - How did this link to how you decided who the Universal Credit would be paid to? How did this feel for both of you?
 - Ask lead carer: How did being the lead carer impact your work requirements on Universal Credit? How do you feel about this?
 - Ask both: What impact did the lead carer’s work requirements have on your family? How do you feel about this?
- Have you decided how you will manage Universal Credit claims as a couple in the future? For example, if DWP needed further updates on your circumstances, answering any other questions from DWP etc.
 - How will this work?
 - How did you decide this?
 - How are you feeling about this?

Understanding the main barriers to UC among those who have not yet claimed or started the process 10-15 mins

MODERATOR: ASK THIS SECTION IF NOT YET CLAIMED UC. THROUGHOUT – PROBE ON BOTH MEMBERS OF COUPLE FOR F2F INTERVIEWS AND OTHER PARTNER FOR SOLO INTERVIEWS

You mentioned earlier that you haven’t started the process of claiming UC. I’d like to ask some questions to understand why that is.

MODERATOR: words in bold italics are for those who haven’t claimed but said they intend to. Please don’t read out the words in bold italics to customers who have said they haven’t claimed and don’t intend to.

UC Journey

- Can you talk me through your understanding of the process of claiming Universal Credit, step by step?
 - Did / have you look / looked at the application process to see what you would need to do to make a claim?
 - What do you know about claiming as a couple? Probe: what impact did / does this have on your decision not to apply for UC / to apply for UC?
 - Have (either of) you started the application?
 - How difficult or easy did / does it seem to you to make a claim?
 - For each partner probe:
 - Making a claim online
 - Verifying ID
 - To what extent did your decision not to claim relate to the process of claiming so far?
- What is your understanding of the individual work conditionality requirements for claiming UC?
 - What impact, if any, does / did this have on your decision not to claim so far?
- Was / is there anything else that influenced / has influenced your decision to delay making a Universal Credit claim as a couple?
 - Were/ are there any other factors that influenced your decision not to claim Universal Credit so far that we haven't already discussed. Probe on positives and negatives

Communication with DWP

- Have either or both of you received a termination letter?
 - If yes: tell me in your own words the key messages this letter communicated to you? How did it make you feel? What action, if any, have you taken since?

Impact of not claiming

- What impact has not claiming had on your financial situation?
- Have you done anything to make up the difference in income?
- Has not claiming had any other impacts on you? Probe on: work, family life, home, wellbeing

Moderator: Do not ask the following questions to those who have already said they intend to claim in the future

- Would you consider claiming for Universal Credit in the future? Is this different / the same for each partner?
 - Is there are a particular time in the future that you would consider claiming? Why is that?
 - Probe on factors influencing this e.g. employment changes; childcare costs

Summing up 2-3 mins

We are coming to the end of the interview, but I have a few final questions before we finish.

- If there was one thing that DWP could do to best support each of you going forward, what would it be?
- If already claimed / started to claim UC: What would be the most important thing for us to feed back to DWP about your experience of Universal Credit?
- If not claimed UC: What would be the most important thing for us to feed back to DWP about Universal Credit?
- Finally, is there anything else you would like to mention that we haven't had the opportunity to discuss?

Thank and reiterate confidentiality. Incentives = a £30 e-voucher or paper voucher each (f2F) as a 'thank you' from Ipsos for their time and contribution.


2.4.1 Follow-up support leaflet - Singles




Thank you for taking part in an interview about your experience of claiming benefits. Sometimes, talking about things can raise questions, or make people feel upset or worried. Below is a list of some organisations that can provide help, advice or someone to talk to.

We know not everyone will need support. We are giving this leaflet to everyone we spoke to, in case they need it.



If you have questions about the research, please email UK-PA-DWP-claimingbenefits@ipsos.com or you can call Sally at Ipsos on 020 3059 5003.

Help with money and benefits

	<p>Citizens Advice give free, confidential information and advice about money, legal and other problems.</p> <p>http://www.citizensadvice.org.uk/</p>	<p>0800 144 8848</p> <p>Monday – Friday 9am to 5pm</p>
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	<p>MoneyHelper is an organisation that provides free money guidance and debt advice.</p> <p>http://www.moneyhelper.org.uk/en</p>	<p>0800 138 7777</p> <p>Monday – Friday 8am to 6pm</p>
	<p>Turn2us is a national charity that helps people get access to welfare benefits and other support.</p> <p>http://www.turn2us.org.uk</p>	<p>0808 802 2000</p> <p>Monday – Friday 9am to 5pm</p>
	<p>StepChange is an organisation offering free debt advice and money management.</p> <p>http://www.stepchange.org</p>	<p>0800 138 1111</p> <p>Monday - Friday 8am to 8pm Saturday 9am to 2pm</p>



Help with housing

	<p>Shelter is a charity that helps people in housing need by providing advice. They can offer practical help if you cannot find somewhere to stay.</p> <p>www.shelter.org.uk</p>	<p>0808 800 4444</p> <p>Monday – Friday 8am to 8pm</p> <p>Weekends and bank holidays 9am to 5pm</p>
	<p>Housing Matters is a charity in Bristol which provides advice, support and advocacy for housing in the surrounding areas.</p> <p>https://housingmatters.org.uk/</p>	<p>0117 935 1260 / admin@housingmatters. k</p>

Help for disabled people

 <p>Disability Law Service Fighting injustice for disabled people</p>	<p>Disability Law Service is a charity that provides free legal advice on care, employment, housing and benefits to disabled people and their carers.</p> <p>http://www.dls.org.uk</p>	<p>020 7791 9800</p> <p>Monday – Friday 9:30am-5pm</p>
	<p>Scope is a disability charity giving information and support.</p> <p>https://www.scope.org.uk/</p>	<p>0800 800 3333</p> <p>Monday – Friday 9am to 6pm</p> <p>Saturday – Sunday 10am to 6pm</p>

Help with mental wellbeing or difficult feelings

	<p>Mind is a mental health charity that provides confidential support for mental wellbeing, and information about mental health services.</p> <p>https://www.mind.org.uk/</p>	<p>0300 123 3393</p> <p>Monday - Friday 9am to 6pm</p>
	<p>Samaritans offer confidential, free emotional support.</p> <p>https://www.samaritans.org/</p>	<p>116 123</p> <p>2 ours a day</p>

2.4.2 Follow-up support leaflet - Couples

Thank you for taking part in an interview about your experience of claiming benefits. Sometimes, talking about things can raise questions, or make people feel upset or worried. Below is a list of some organisations that can provide help, advice or someone to talk to.


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Help with money and benefits

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	<p>StepChange is an organisation offering free debt advice and money management.</p> <p>http://www.stepchange.org</p>	<p>0800 138 1111</p> <p>Monday - Friday 8am to 8pm Saturday 9am to 2pm</p>

Help with relationships

	<p>Relate is a charity that offers relationship support. They provide advice on marriage, LGBT issues, divorce and parenting.</p> <p>https://www.relate.org.uk/</p>	<p>01302 347866</p> <p>Monday-Friday 9am-5:30pm</p>
	<p>Marriage Care is a charity that offers relationship advice, marriage preparation and counselling.</p> <p>https://www.marriagecare.org.uk/</p>	<p>0800 389 3801</p> <p>Monday-Thursday 9am-6pm</p>

Help with housing



	<p>Shelter is a charity that helps people in housing need by providing advice. They can offer practical help if you cannot find somewhere to stay.</p> <p>www.shelter.org.uk</p>	<p>0808 800 4444</p> <p>Monday – Friday 8am to 8pm</p> <p>Weekends and bank holidays 9am to 5pm</p>
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	<p>Scope is a disability charity giving information and support.</p>	<p>0808 800 3333</p> <p>Monday – Friday 9am to 6pm</p>

	https://www.scope.org.uk/	Saturday – Sunday 10am to 6pm
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	<p>Samaritans offer confidential, free emotional support.</p> <p>https://www.samaritans.org/</p>	<p>116 123</p> <p>24 hours a day</p>

2.5 Ipsos standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.



ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates IQCS (Interviewer Quality Control Scheme). It covers the five stages of a Market Research project. Ipsos was the first company in the world to gain this accreditation.



Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos endorses and supports the core MRS brand values of professionalism, research excellence and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation. We were the first company to sign up to the requirements and self-regulation of the MRS Code. More than 350 companies have followed our lead.



ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.



ISO 27001

This is the international standard for information security, designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.



The UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA) 2018

Ipsos is required to comply with the UK GDPR and the UK DPA. It covers the processing of personal data and the protection of privacy.



HMG Cyber Essentials

This is a government-backed scheme and a key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment-validated for Cyber Essentials certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide

organisations with basic protection from the most prevalent forms of threat coming from the internet.



Fair Data

Ipsos is signed up as a “Fair Data” company, agreeing to adhere to 10 core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.
