

# 9.2c

## Personal Equity Plans

Number of Individuals holding PEPs by country, region and market value (1), 2006-2007

Numbers: thousands

Government Office Region (GOR)	Number of Individuals						
	Market Value (£)						
	(lower limit)						
	Less than 5,000	5,000	10,000	30,000	50,000	100,000 or more	Total
England							
North East	29	26	34	8	6	2	104
North West	73	70	103	31	21	9	305
Yorkshire and the Humber	53	49	74	19	14	7	216
East Midlands	53	46	67	19	12	6	204
West Midlands	55	59	79	22	15	7	238
East of England	72	70	107	36	28	14	326
London	69	70	111	37	31	19	337
South East	107	108	170	58	48	26	517
South West	68	70	101	35	23	13	310
<b>Total</b>	<b>579</b>	<b>570</b>	<b>846</b>	<b>264</b>	<b>198</b>	<b>102</b>	<b>2,559</b>
Wales	33	34	45	13	9	4	137
Scotland	58	56	74	22	16	9	236
Northern Ireland	14	12	15	4	3	1	49
Overseas and unknown (2) (3)	4	3	4	1	1	0	14
United Kingdom	<b>688</b>	<b>674</b>	<b>985</b>	<b>304</b>	<b>227</b>	<b>117</b>	<b>2,995</b>

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### Footnotes

1. The estimates represent the total number of individuals holding Personal Equity Plan(s) at 5 April 2007. Market values represent the total value of subscriptions by individuals to PEPs since 1 January 1987, plus any accumulated interest or re-invested dividends, less any withdrawals. The value is at 5 April 2007.
2. Individuals are allocated to regions according to their postcode, which is used to determine the appropriate region. A small number of people with overseas addresses have not been allocated to a region but have been included in the UK figures. Investigations indicate that the vast majority of these are for families of armed forces or other crown servants serving overseas. There are also a small number of people where it was not possible to identify their postcode. These also have been included in the UK figures.
3. Due to the limitations of sample size, these figures are tentative for market values greater than £10,000.

### Notes on the tables

1. The estimates are based on a sample of individuals who hold fund values in PEP(s). This information is reported by providers to HM Revenue & Customs on an annual basis, primarily for compliance purposes.
2. As well as containing individual details such as the name and date of birth, the data also contains an individuals National Insurance number (NINO). Using this it is possible to aggregate across those who hold more than one PEP and the estimates in Tables 9.2a to 9.2c are for individuals.
3. In addition, since the NINO is present, we have been able to link this data to other HM Revenue & Customs sources, primarily the Survey of Personal Incomes (SPI), in order to assess the age and gender of the individual holders.  
[For more details regarding the SPI see the Incomes Distribution section of IRS.](#)
4. Whilst in theory the data source should give us details of all individuals, in practice due to incorrect or missing data less than 100% of records are available for analysis. Therefore imputation techniques based on the income distribution of those who have a reported holding of PEP(s) have been used to take account of this shortfall. The aggregate market values are then consistent with those published in Table 9.2.

