

**EU-LFS 2012 AD-HOC MODULE
ON THE TRANSITION FROM
WORK TO RETIREMENT**

WAVES **1,2,3,4,5** **DIRECT and PROXY (DIR = 1,2)**

Opening filter if (50<=CALC= > 69)

PREAMBLE “I would now like to ask you some questions on your future plans for retirement from work and/or your existing experiences of retirement.”

Press 1 to continue.

Everybody

- Aged 50-69 (inclusive) and
- Did any work during the reference week
- Was not working but had a job or business from where they were absent during the reference week
- Was not working because on “lay off” but indicate that they were over 49 when they last worked
- Has neither worked nor had a job or business during the reference week

If opening filter applies then ask 1st question (PENSION)

Q1. PENSION

Column 197

Filter **Opening filter** if (50<=CALC= > 69)

Question	Do you receive a pension?
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Answer

1. Yes
2. No

No answer (utilise refusal (8) / don't know (9) option for field officers)

Q2. PENSTYPE(1-8)

Column 198-205

Filter **IF PENSION = 1**

REMOVE “DON’T KNOW” or “REFUSAL”

If respondent has a pension

Question	What type of pension do you currently receive?
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Note: Multiple responses to be recorded, where applicable.

Answer

1. Old-age pension. State (statutory) scheme.
2. Old-age pension. Work (occupational) scheme
3. Old-age pension. Personal scheme
4. Old-age pension. Scheme unknown
5. Unemployment pension
6. Disability pension
7. Survivor’s / Widows pension
8. Other pension(s) or type of pension unknown

Q3. EARLYRET

Column 206

Filter IF (PENSTYPE = "1" or "2" or "3" or "4" or "6" or "8")

*If respondent is receiving an **OLD AGE** pension*

Question	Did you retire earlier than the standard expected age of retirement (66 years)?
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Answer 1 Yes
2 No
No answer (utilise refusal (8) / don't know (9) option for field officers)

Q4. AGEPENS

Column 207-208

Filter IF (PENSTYPE = "1" or "2" or "3" or "4")

*If respondent is receiving an **OLD AGE** pension*

Question	What age were you when you first received an old age pension?
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Answer 2 digits
No answer (utilise refusal (998) / don't know (999) option for field officers)

Q5. REASNOT

Column 209

Filter If ((JOBABS = "Yes") and (whyabs = "ON TEMPORARY LAY-OFF") and (receipt NE "YES"))
and ((NEWJOB NE "yes" or WHENNEWJ NE "yes")) and (LOOKWK NE "Yes"))
and (PENSION = "Yes")

(Wstator =3 and
seekwork = 3)

Or

IF ((PAIDWORK = "No") or (JOBABSN = "No") or (UNPAIDWK = "No"))
and ((NEWJOB NE "yes" or WHENNEWJ NE "yes")) and (LOOKWK NE "Yes"))
and ((PENSION = "YES"))

(Wstator =5 and
seekwork = 3)

Anyone who is not employed (including those on lay-off) and not seeking work but are receiving a pension

Question	What was the main reason why you did not stay longer at work?
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Answer

- 1 Favorable financial arrangements to leave
- 2 Lost job and/or could not find a job
- 3 Had reached the maximum retirement age
- 4 Had reached eligibility for a pension
- 5 Other job-related reasons
- 6 Own health or disability
- 7 Family or care-related reasons
- 8 Other

No answer (utilise refusal (98) / don't know (99) option for field officers)

Q6. WORKLONG

Column 210

Filter

If ((JOBABS = "Yes") and (whyabs = "ON TEMPORARY LAY-OFF") and (receipt NE "YES"))
and ((NEWJOB NE "yes" or WHENNEWJ NE "yes")) and (LOOKWK NE "Yes")
and (PENSION = "Yes")

(Wstator =3 and seekwork = 3)

Or

IF ((PAIDWORK = "No") or (JOBABSN = "No") or (UNPAIDWK = "No"))
and ((NEWJOB NE "yes" or WHENNEWJ NE "yes")) and (LOOKWK NE "Yes")
and ((PENSION = "YES"))

(Wstator =5 and seekwork = 3)

Anyone who is not employed (including those on lay-off) and not seeking work but are receiving a pension

Question	Would you have preferred to have remained in work at the time of your retirement?
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Answer

- 1 Yes
- 2 No

No answer (utilise refusal (8) / don't know (9) option for field officers)

Q7. REDUCHRS

Column 211

Filter If (PAIDWORK = "Yes") or (UNPAIDWK = "Yes")
and (PENSION = "YES")
(Wstator = 1)

Or

If (JOBABS = "Yes") and (WHYABS NE "ON TEMPORARY LAY-OFF")
and (PENSION = "YES") (Wstator = 2)

Or

If (JOBABS = "Yes") and (WHYABS = "ON TEMPORARY LAY-OFF") and (RECEIPT = "Yes")
and (PENSION = "YES") (Wstator = 2)

Or

If (JOBABS = "Yes") and (WHYABS = "ON TEMPORARY LAY-OFF") and (RECEIPT NE "YES") and (NEWJOB NE "yes")
and (LOOKWK NE "Yes")
and PENSION = "Yes" (Wstator =3 and
seekwork = 3)

Or

IF ((PAIDWORK = "No") or (JOBABSN = "No") or (UNPAIDWK = "No")) and (LOOKWK NE "Yes")
and (PENSION = "YES") (Wstator =5 and
seekwork = 3)

All individuals between 50 and 69 inclusive that are in work or not currently employed and are not seeking work that are in receipt of a pension

Question	Will you, or did you reduce your working hours in preparation for full retirement from work?
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Answer

- 1 Yes, before receiving the first old-age pension
- 2 Yes, since or after receiving the first old age pension
- 3 No

No answer (utilise refusal (8) / don't know (9) option for field officers)

Q8. STAYWORK

Column 212

Filter (if PAIDWORKN = "Yes" or UNPAIDWK = "Yes") and (PENSION = "YES")

Or

(if JOBABS = "Yes" and WHYABS ^= "ON TEMPORARY LAY-OFF") and (PENSION = "YES")

Or

(if JOBABS = "Yes" and WHYABS = "ON TEMPORARY LAY-OFF" and RECEIPT = "Yes") and (PENSION = "YES")

All individuals that are still in work (paid or unpaid) and are in receipt of a pension

Question	I understand from previous questions that you are still working and also receiving a pension. What is the main factor that makes you stay in work?
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Answer

- 1 To establish or increase future retirement pension entitlements
- 2 To provide sufficient personal/household income
- 3 Combination of 1 and 2
- 4 Non-financial reasons, e.g. work satisfaction

No answer (utilise refusal (8) / don't know (9) option for field officers)

Q9. PLANSTOP

Column 213

Filter if(PAIDWORKN = "Yes" or UNPAIDWK = "Yes") and (PENSION = "YES")

Or

(if(JOBABS = "Yes" and WHYABS NE "ON TEMPORARY LAY-OFF")
and (PENSION = "YES") Or

if(JOBABS = "Yes" and WHYABS = "ON TEMPORARY LAY-OFF" and RECEIPT = "Yes")
and (PENSION = "YES")

All individuals that are still in work (paid or unpaid) and are in receipt of a pension

Question	When do you intend to retire from work ?
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Answer

- 1 In up to 1 year
- 2 In more than 1 year up to 3 years
- 3 In more than 3 years up to 5 years
- 4 In more than 5 years up to 10 years
- 5 More than 10 years

No answer (utilise refusal (8) / don't know (9) option for field officers)

Q10. BUILDPEN(1-4)**COLUMN 214-217**

Filter If((PENSION="No" or refusal (8) or don't know (9))

or

(PENSTYPE = "5" or "6" or "7" or "8")

*Everybody aged 50-69, working or having worked after the age of 50, not receiving an old age pension***Note: Multiple responses to be recorded, where applicable.**

Question	Which of the following pension payments are you eligible for or have made provisions to receive?
Answer	1 Old-age pension. State (statutory) scheme. 2 Old-age pension. Occupational (work) scheme 3 Old-age pension. Personal scheme 4 Old-age pension. Scheme unknown No answer (utilise refusal (8) / don't know (9) option for field officers)

Q11. CONTWORK**Column 218**

IF (PENSION NE 1)

And (BUILDPEN NE "refusal" and "don't know")

All individuals between 50 and 69 inclusive that are about to start or are looking for work and are not in receipt of a pension

Question	Do you intend (at the moment) to continue working/ seeking employment after you begin receiving any potential pension payments?
Answer	1 Yes, for financial reasons 2 Yes, for other reasons 3 No, stop immediately when receiving old age pension 4 No, stop before receiving old-age pension No answer (utilise refusal (8) / don't know (9) option for field officers)

END COMMENTS**"Thank you for taking the time to answer the transition from work into retirement module." Press 1 to continue.**