

**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.**