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. P E N S I O N            Column 197

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

Question   Do you receive a pension?

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?

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

| Filter | IF (PENSTYPE = “1” or “2” or “3” or “4” or “6” or “8”) |

If respondent is receiving an OLD AGE pension

<table>
<thead>
<tr>
<th>Question</th>
<th>Did you retire earlier than the standard expected age of retirement (66 years)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer</td>
<td>1 Yes</td>
</tr>
<tr>
<td></td>
<td>2 No</td>
</tr>
</tbody>
</table>

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

### Q4. AGEPENS

| Filter | IF (PENSTYPE = “1” or “2” or “3” or “4”) |

If respondent is receiving an OLD AGE pension

<table>
<thead>
<tr>
<th>Question</th>
<th>What age were you when you first received an old age pension?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer</td>
<td>2 digits</td>
</tr>
</tbody>
</table>

No answer (utilise refusal (998) / don’t know (999) option for field officers)

### Q5. REASNOT

| 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 (Wstator =3 and seekwork = 3) or ((PAIDWORK = “No”) or (JOBABSN = “No”) or (UNPAIDWK = “No”)) and ((NEWJOB NE “yes” or WHENNEWJ NE “yes”) and (LOOKWK NE “Yes”)) and (PENSION = “YES”)) |

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?

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

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 (JOBBSN = “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?

Answer:
1. Yes
2. No
No answer (utilise refusal (8) / don’t know (9) option for field officers)
Q7. REDUCHRS

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 = “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?

**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

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?

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

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?

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)

**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.

<table>
<thead>
<tr>
<th><strong>Question</strong></th>
<th><strong>Answer</strong></th>
</tr>
</thead>
</table>
| Which of the following pension payments are you eligible for or have made provisions to receive? | 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

**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*

<table>
<thead>
<tr>
<th><strong>Question</strong></th>
<th><strong>Answer</strong></th>
</tr>
</thead>
</table>
| Do you intend (at the moment) to continue working/ seeking employment after you begin receiving any potential pension payments? | 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.