AHM 2006 “Transition from Work into Retirement“

Interviewer: To all persons aged 50 to 69 who are
- at work (Block D answered) or
- currently not at work, but who were at work at age 50 or older (Block J answered and J4c=1)

R0  Respondent of the Ad hoc Module?
   1  Yes  → Persons not at work: go to R1
       → Persons at work: go to R2
   2  No   → END

R1  Have you stopped working altogether? (with the intention never again to work for pay or as self-employed)?

   Interviewer: Assign answer – if no answer is provided, please read out alternatives!
   1  Yes, I have stopped working altogether  → Go to R4
   2  No, I have not stopped working altogether
   8  Not known/Don’t know
   9  Refusal

R2  At what age do you plan to stop working?

   Interviewer: Insert years or assign answer!
   ______ , ___ years  → Go to R4
   94  I don’t know exactly (yet) when I will stop working
   98  Not known/Don’t know
   99  Refusal

R3  Can you tell me when approximately you will stop working?

   Interviewer: Assign answer – if no answer is provided, please read out alternatives!
   1  Between 50 and 54
   2  Between 55 and 59
   3  Between 60 and 64
   4  At 65 or later
   5  I have absolutely no idea when
   8  Not known/Don’t know
   9  Refusal
R4 In total, how many years were you working for pay or profit? Please tell me the total number of working years excluding parental leave, military or alternative civilian service and traineeships.

In total, how many years have you been in the work force? Please tell me the total number of working years excluding parental leave, military or alternative civilian service and traineeships.

Insert years!

_____.__ years

98 Not known/Don’t know
99 Refusal

R5 Have you reduced your working hours in preparing for retirement? If so, in which way?

This question is to cover phased transition into retirement. Persons reducing their working hours for reasons other than imminent retirement please answer No.

Interviewer: Read out all alternatives!

1 Yes, with block model of progressive retirement → Go to R7
2 Yes, but not with block model of progressive retirement → Go to R7
3 Yes, but not with progressive retirement model → Go to R7
4 No → Persons not at work who have not yet stopped working altogether (R1=2) and persons at work: Go to R6 → Else: Go to R7

8 Not known/Don’t know
9 Refusal

R6 To prepare for retirement, will you reduce your working hours within the next five years?

Interviewer: Assign answer – if no answer is provided, please read out alternatives!

1 Yes, planned within the next five years
2 No, not planned within the next five years
3 I do not have any plans to this effect for the next five years
4 Plans are not relevant (since e.g. out of work, insecure job)
8 Not known/Don’t know
9 Refusal
R7 Which of the following reasons would have contributed to your staying in the workforce longer?

*Which of the following reasons would contribute to your staying in the workforce longer than planned?*

<table>
<thead>
<tr>
<th>Reason</th>
<th>Yes</th>
<th>No</th>
<th>Not known/Don’t know</th>
<th>Refusal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 More flexible working time arrangements</td>
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<td></td>
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<tr>
<td>2 Improved vocational and further training opportunities</td>
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<tr>
<td>3 Improved health/safety at the workplace</td>
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</tr>
</tbody>
</table>

R8 Which other reasons would have contributed to your staying in the workforce longer?

*Which other reasons would contribute to your staying in the workforce longer than planned?*

<table>
<thead>
<tr>
<th>Reason</th>
<th>Yes</th>
<th>No</th>
<th>Not known/Don’t know</th>
<th>Refusal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Other responsibilities/tasks</td>
<td></td>
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<td></td>
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<tr>
<td>2 Better working atmosphere</td>
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<tr>
<td>3 Higher pay</td>
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<tr>
<td>4 Better personal health</td>
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<td>5 Existence of a job</td>
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<tr>
<td>8 Other, namely ........................................................................</td>
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</tbody>
</table>

R9 Do you currently receive any pension or pension-related benefit?

*Also including advance payments to pension benefits, early retirement pension, invalidity pension, disability payments, special pension payments (Sonderruhegeld), progressive retirement schemes/partial pension, widow/widower pension: Yes!*  
*Pension from abroad: Yes!*  
*Unemployment benefits/assistance: No!*

<table>
<thead>
<tr>
<th>Yes/No</th>
<th>Action</th>
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<tbody>
<tr>
<td>1</td>
<td>Go to R13</td>
</tr>
<tr>
<td>9</td>
<td>Refusal</td>
</tr>
</tbody>
</table>

8 Not known/Don’t know
R10  I shall now read out to you a number of benefits. Please respond to each and tell me whether you are currently receiving it.

MULTIPLE RESPONSES! Read out alternatives!
CODE 5: only disability payments from statutory accident insurance (excluding surviving dependants' pensions)!
CODE 6: e.g. social assistance (Sozialhilfe), compensation for war victims or prisoners of war;
EXCLUDING: equalisation supplements (Ausgleichszulagen), subsidies for care or living costs (e.g. long-term care benefits; heating subsidy)

<table>
<thead>
<tr>
<th>Benefit Description</th>
<th>Yes</th>
<th>No</th>
<th>Not known/Don't know</th>
<th>Refusal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Own retirement pension (from work)</td>
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<tr>
<td>2  Advance payment on pension</td>
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<td>3  Company pension</td>
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<td>4  Own supplementary private pension</td>
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<tr>
<td>5  Work accident insurance payments</td>
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<td>6  Widow/Widower pensions</td>
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<td>7  Other public benefit, namely ...................................</td>
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</table>

If R10 is own retirement pension (Code 1) → Go to R11
Else → Go to R13

R11  At what age did you first receive your own retirement pension?

Please insert age!
When benefiting from more than one pension scheme, please state the one you received first.

______, ______ years

98  Not known/Don’t know
99  Refusal

R12  Is your own retirement pension…

Please show card!
Excluding: disability/accident insurance payments!
If you receive multiple pensions please state the highest

1  an invalidity or occupational disability pension
2  an early retirement pension due to reduced capacity to work
3  an early retirement pension due to long insurance period/corridor pension
4  an early retirement pension due to unemployment or a transitional allowance
5  a special pension payment (Sonderruhegeld) for heavy labour, partial/progressive pension scheme
6  a regular old-age pension
7  a civil servant’s retirement pay (“Ruhegenuss”)
8  another public old-age pension of your own, namely, ……………………

98  Not known/Don’t know
99  Refusal

→ Persons at work: Go to R14
→ Persons not at work: Go to R15
R13 You are not yet receiving your own old-age pension. Are you already legally entitled to do so?

Legal entitlement = sufficiently long period of insurance + minimum retirement age!
Recipients of advance payments on pension please answer Yes!

1 Yes → Persons at work: Go to R14
   → Persons not at work: Go to R15
2 No → Persons not at work: Go to R15
   → Persons at work: END
8 Not known/Don't know → Persons at work: Go to R14
9 Refusal → Persons not at work: Go to R14

R14 What is the main reason for your staying in the workforce?

ONE RESPONSE ONLY!
Interviewer: Assign answer – if no answer is provided, read out alternatives!

1 Higher pension entitlements → END
2 Contributing to present household income → END
3 Joy/Interest in work → END
4 Partner still working → END
5 Can’t find a successor (for business) → END
6 Other reasons → END
8 Not known/Don’t know → END
9 Refusal → END

R15 Let us now talk about your last occupation:
What was your situation like immediately after your last occupation?

Respondents’ self-assessment!

Interviewer: Assign answer – if no answer is provided, read out alternatives!

1 Old-age or early retirement pension → Go to R17
2 Unemployed → END
3 Long-term sick or disabled → END
4 Other → END
8 Not known/Don’t know → END
9 Refusal → END

R16 What was your main reason for retirement?

Interviewer: Show Card!

1 Notice by employer (or expiry of a fixed-term employment contract)
2 Company bankruptcy/liquidation
3 Unfavourable working hours
4 Problems related to that job (stress, excessive workload, lack of a challenge)
5 Negative working atmosphere
6 Favourable financial arrangements upon leaving
7 Illness or inability to work
8 Taking care of (grand)children or adults in need of care
9 Asked to retire due to age
10 Met legal requirements for receiving pension benefits
11 Other
88 Not known/Don’t know
R17  Would you have preferred to continue working (at your previous or another workplace)?

1  Yes, at the same workplace → END
2  Yes, at another workplace → END
3  No → END
8  Not known/Don’t know → END
9  Refusal → END