

**Lucie Vidovičová\***

Masaryk University

## PREFERENCE THEORY IN ADVANCED AGE AND THE OLDER CZECH WORKFORCE

In this article we make use of preference theory developed by Hakim (2000) in the context of reconciling work and family to cover and explain different patterns of retirement exit paths and retirement satisfaction levels in the Czech Republic. We propose that lifestyle preferences and values may help to explain why some older workers continue to work while others are determined to retire as early as possible. Three types are identified among the 55–65 age group: work oriented, retirement oriented, and adaptive. The data shows that self-perception of the respondent as being active or more rest-oriented is associated with actual labour market activity of the respondent. Different types also perceive and evaluate labour market exit differently, and most importantly they differ in their reaction to various labour market and pension policies and family/partnership conditions. In the discussion we challenge the notion of active ageing as a general “one-size-fits-all” policy and urge that more attention be paid to the role of individual values and preferences when looking at the organisation of latter life roles.

Keywords: preferences, older workers, retirement, active ageing, labour market activity

### INTRODUCTION

Given the rapid ageing of European societies and more pronounced demographic developments in Eastern Europe, combined with fiscal difficulties brought about by the recent economic crisis, discussions on long-term sustainable economic and social development continue to occupy social scientists, economists and politicians on the regional and European levels. Following the “senior citizenship” paradigm, transforming the rhetoric of “older people as a burden” to that of “older people as a resource” was introduced (Walker 2002). As a result, the notion of “active ageing” gained traction and unmatched power in the European public policy arena. However, to this day the definitions used and concepts derived from them differ (Perek-Białaś, Ruzik and Vidovičová 2006). Within the understanding of the European Commission active ageing is understood as “a coherent strategy to make ageing well possible in ageing societies”, which in practice means “educating and training throughout life, adopting

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\* Corresponding author: Lucie Vidovičová, Office for Populational Studies, Faculty of Social Studies, Masaryk University, Joštova 10, 602-00 Brno, Czech Republic; e-mail: [lucie.vidovic@seznam.cz](mailto:lucie.vidovic@seznam.cz).

healthy life styles, working longer, retiring later and being active after retirement” (European Commission 2002). This approach underwent sharp criticism for being presented as the only way to “grow old well”, disregarding and disrespecting those who cannot or do not want to stay active in this sense of the term, and for introducing new a hierarchy and new forms of exclusion among ageing people (Hamblin 2010). As Neilson (2006 in Hasmanová 2013) noted, all understandings of active ageing concepts are based on an idea of individuals who actively strive to influence the conditions of their ageing towards minimal dependency on social systems and other people, towards financial near-self-sufficiency and independence from the state. Given the development of the welfare state in Europe, that is indeed a paradigm change. But how does this paradigm change resonate with the citizens? Are they all in favour of these challenges and new role requirements put before them or there are groups resisting active ageing? And how are they to be identified?

## RETIREMENT PLANS, PREFERENCES AND WORK VALUES – THE EMPIRICAL GAPS

In this paper we will follow the line of research on retirement decision-making and bring it into the post-transformational Central European context. The Czech Republic, together with Slovakia and Hungary, has been identified by Hofäcker and Unt (2013) as a country with an institutional framework unfavourable for continuing employment, with a low average retirement age, low health expectancy, “virtually no participation of older people in retraining (1.2%) and overall very little spending on active labour market policies” (Hofäcker and Unt 2013: 176). The authors also believe that these structural dimensions are reinforced by attitudinal factors, such as considering onset of old age to be before age 60, low levels of positive images of older people in the society, and extremely little support for an increase in the statutory retirement age. We will provide some points for discussion whether these characteristics do apply to all of the ageing Czech workforce in general, or whether there are groups within the older workforce which by their work/retirement preferences go in the opposite direction, and how can they be empirically identified. We adapt the work-family preferences theory to advanced age in order to identify the three “ideal” types of older workers and test their work/retirement status, retirement timing, expectations and preferences. By this we try to offer some answers to Shacklock and Brunetto’s (2009: 252) sigh, that “there is lack of knowledge about factors affecting older workers’ intentions to continue in employment” – to this we may add in the context of Eastern European welfare regimes especially.

Many authors agree that the experience of retirement (transition) depends on previous experience of work, push and pull factors exerted by the workplace, and employment practices (Armsstrong-Stassen 2008; Vickersaff, Cox and Keen 2003), and/or on the circumstances under which this transition occurs (Parry and Taylor 2007). Furthermore, the debates on what affects people’s choices and decisions on retirement include societal context, structural factors, belief systems and cultural attitudes, organizational and family contexts, individual skills, personalities, and capital (Duberley, Carmichael and Szmigin 2014; Radl 2013; Szinovacz 2003; Raymo and Sweeney 2006; Szinovacz and DeViney 1999). Shacklock and Brunetto (2009) tested and

confirmed the older workers' intentions to continue working by looking at values such as importance of work, work "passion" or attachment to work in the context of Australia; Higgs et al. (2003) did likewise in the context of UK on the sample of civil servants; Frieze, Olson and Murrell correlated positive views of work with the desire for continuous work within a sample of highly educated professionals in the US. Similar results are also found in a qualitative study by Barnes et al. (2004). Flynn's (2009) meta-analysis of older workers' typologies and studies about older workers' willingness to delay retirement or retirees' willingness to return to work have also repeatedly found features such as work commitment and generativity to have a positive impact. However, studies questioning work-related values and their covariates in the context of CEE are scarce, as are studies showing that/whether those with lower values of work importance are among those exiting the labour market earlier.

Hult and Stattin (2009) investigated to what degree policy changes happening from 1997 to 2005 aimed at prolonging people's working lives have been successful in influencing people's commitment to paid work in Sweden, Denmark, Great Britain and Hungary. Their answer is that the policy efforts were *not* reflected in the attitudinal development in the same period, keeping employment commitment generally high in Denmark and Sweden and comparatively low in Great Britain and Hungary. On the other hand, according to Borgulya and Hahn (2008), people in Eastern Europe are more likely to consider work "very important" than in Northern and Western Europe, but many other variations are found *within* the CEE countries. Therefore, we would argue, that (a) the assumption of cultural transferability of these results is to be challenged, and results re-evaluated within specific cultural and structural settings; (b) a look behind the policy scene towards more micro- and meso-level aspects being stressed (and policy non-responsiveness decoded); and last but not least (c) the partial emphasis within available studies on early-exit versus prolonged working careers should be supplemented. Therefore in this paper we will look more closely at the crossroads of micro-level values held by older workers and available, structurally given opportunities. Put more precisely: Do Czech older workers differ from younger groups in their work-value orientation? Can the specific prevalence of each type be evaluated? Can the typology be potentially helpful in predicting labour market behaviour and policy reactivity?

## THE PREFERENCE THEORY

We have proposed (Vidovičová 2005) that Hakim's (2000) preference theory could be successfully applied to latter age, if we, inspired by women juggling family-work preferences, look at the preferences towards activity vs inactivity in latter age. We have tested and proved this theory in terms of everyday leisure activities in which people of advanced age engage. However, the actual engagement in paid employment was left out of the previous study. Here we therefore propose to test the preference theory for latter age in terms of work vs retirement preferences. Let us recap some of the basic assumptions and their application to later life and work vs retirement preferences. The preference model, based on triadic basis, stresses the explanatory strength of preferences, values and life strategies and derives its reliability from the (pre-) existence of a 'new social scenario'. There was a tacit assumption that the

model's individual components approximately copy normal distribution, which was proved by the analysis of leisure pursuits in previous research (Vidovićová 2005). We also take on the hypothesis that within the model the explanatory strength of some commonly studied socio-demographic characteristics is weakened. The reason for this is that the preference model of activity in advanced age is based on the presumption that the emergence of a new societal scenario enabled the (relatively) free choice between activity and inactivity, while in the population the choices and life strategies related to them have a probabilistic character and a normal distribution.

This abovementioned “new scenario of ageing societies” rests on a number of bases. On the one hand there is the historically unprecedented rise in life expectancy, which is – due to the second demographic transition – becoming massively observable in modern societies. Further there is the development of social security, which represents a legitimate source of income in older age and thus to large extent prevents poverty in old age. The development of individualism and post-materialism in the society in focus here brought the importance of individual choices into the foreground and intensified the desire for each individual's self-realization in all age groups. Not least important is (the general threat of) economic instability, which – together with the previously mentioned factors – has gradually led to the already mentioned change in discourse from ‘older people as a burden’ to ‘older people as a (re)source’. We may argue that these societal changes made latter life stages more fluid and less fixed, not only offering but also requiring more individual, agentic choices among life strategies (and activities and their timing) in later life. It should be noted however, that this scenario has appeared within the EU in different timeframes, with Central and Eastern European countries somewhat lagging behind and then catching up in fast forward steps after the 1989/1990 socio-political changes (Sobotka et al. 2008), continuously dynamically evolving and changing in response to, for example, the recent economic crisis.

We anticipate the theoretical model, which we will further analyse, to have three basic types with working labels as follows: work-oriented (active), adaptive, and retirement-oriented (inactive). A brief description of each of the theoretical groups of individuals is given in Table 1. In general, these types should differ in the values they ascribe to work, activity or rest, and they should also differ in their preferred strategies engaged while on the labour market while making plans about timing of labour market exit and general retirement strategies. And as a result, they also differ in ways they perceive and materialise diverse policy proposals and actions.

**Table 1.** Recapitulation of the typology of preference model of activity in advanced age

<b>Active / work oriented</b>	<b>Adaptive</b>	<b>Inactive / retirement oriented</b>
Approx. 10–20% of the older population	Approx. 80–60% of the older population	Approx. 10–20% of the older population
Pro-active regardless of external conditions	Without refined preferences, balance strategies depending on external conditions	Tend towards inactivity and passive pursuits

Table 1 cont.

Possible operationalization: does not plan to restrict work activity, does not make use of retirement, high subjective value of “work” and the feeling of “being useful”	Possible operationalization: retirement/inactivity timed depending on (expected) circumstances, does not plan prolonged activity, “work” only as a source of income	Possible operationalization: plans early retirement and complete inactivity, “work” is not a value <i>per se</i>
Assumption: no reaction to pension policy	Assumption: sensitive to political measures and changes in the life cycle	Assumption: no reaction to employment policy

Source: Vidovičová 2005: 349

The types outlined here attempt to represent an ideal typology in the Weberian sense without any normative or evaluative connotation. From an analytical-empirical viewpoint they are equivalent (cf. Higgs et al. 2003). This, however, does not necessarily apply in terms of political applicability. This typology of life strategies in the case of activities, here particularly in the case of older age groups, is directly linked to the issue of the effectiveness of policies. When analysing the impacts of active ageing policies we are faced with the fact that some individuals are very active, while under the same or very similar objective conditions others are in contrast passive in terms of labour market engagement. Therefore it would be useful to look at factors of lifestyle preferences, to our knowledge thus far not empirically described within the Eastern European welfare regime context, that co-determine the level of labour market activity as a final outcome.

Based on previous research and theoretical statements discussed above, we have defined several assumptions for this particular study on labour market engagement and retirement timing among Czech older workers: First, older people do differ in their values and preferences related to work and labour market activity and their preferences can be categorised into three groups: those who like work, those who would prefer to be retired, and those not having a strongly defined preference and juggle their opinions based on temporary circumstances, being therefore indecisive or adaptive. We also expect that these types are distributed in the population approximately normally, with those strongly work oriented and strongly retirement oriented being on the margins. Second, as values and preferences are here in the position of explanatory features, the usual socio-demographic characteristics, such as age, sex, education or income, will be suppressed. Third, preference theory is believed to be actually able to explain behaviour and/or anticipate future behavioural outcomes, therefore we expect that those work-oriented will have higher engagement in labour market activities than those retirement-oriented. Four, we expect that respondents will be concise in their values and therefore the work-oriented will differ from the retirement-oriented in expectations and evaluations of different labour market exit strategies as well. And five, we expect that different preference types will also differ in terms of their reactions to various family-, work- and retirement-policy related conditions and circumstances. In other words, the work-oriented will prefer and enjoy longer working careers regardless of externalities, while the retirement-oriented will rush into

retirement regardless of any positive incentives stemming from active ageing policies. On the other hand, these two groups should also be more often steady in their decisions, while adaptive types should be more often among those who weigh various aspects.

## THE CONTEXT OF THE CZECH LABOUR MARKET AND PENSION SYSTEM

We will test these above given assumptions on a sample of Czech people aged 55–65 years, which includes working, transiting, and retired persons. In the last 15 years the employment rate of older workers increased from 37% to almost 52%, approaching the national target given within the Europe 2020 strategy as 55%. There are, however, considerable gender differences, as this employment rate reached 62.5% for men but only 41.4% for women in the same age group in 2013. Among the various reasons for this situation is path dependency of the pension system requirements, in which the statutory retirement age differs for men and women with or without children. This is gradually changing, and the common statutory retirement age of 65 years should be reached for the birth cohort of 1966, and of 67 years for those born in 1977 (in 2044). As in many other countries, in the Czech Republic the statutory retirement age is also higher than the effective age of labour market exit. Available OECD statistics show the average for the 2007–2012<sup>1</sup> period: for Czech men this was 63.1 years and for women 59.8 years. However, recent developments show a considerable decrease in postponed labour market exit (i.e. work after retirement statutory age without concurrent pension benefit withdrawal) from 6% to 1% and an even more considerable increase in early pension withdrawal. This in 2012 represented almost one-third of all old age pension benefits paid by the Czech social security administration. Under the old-age pension scheme an early option is available for three years (up to five in some cases) before the statutory retirement age, but not before the age of 60. Besides age, the necessary insurance period has to be reached. Concurrence of continuous economic activity with paid salary and old-age pension benefits is not restricted. Part of this economic activity, however, was and still is carried out in the so-called grey zone of the labour market, i.e. without proper contracts and taxation.

While in their Great Britain-based research Duberley, Carmichael, and Szmigin (2014) talk about their communication partners having difficulty in deciding whether they were retired, in the Czech context there is quite a distinction between “working” and “being retired” roles, as there is a strong connection between the statutory retirement age and the cultural definition of retirement (Vidovičová 2008). The expression “I am in retirement already” (*Už jsem v důchodu*) is often used in conversation as a self-explanatory notion of “being outside of labour market”. The de-standardised retirement pathways and labour market exit strategies (Maestas 2010) are rather new phenomena, and are expected to be more present within the up-coming cohorts of new Czech old age pensioners.

In general, the Czech pension system is organised as pay-as-you-go with the possibility of commercial savings in private pension funds. The system is under continuous attempts

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<sup>1</sup> Source: OECD (2013), *Pensions at a Glance 2013: OECD and G20 Indicators*, OECD Publishing, [http://dx.doi.org/10.1787/pension\\_glance-2013-en](http://dx.doi.org/10.1787/pension_glance-2013-en).

at parametrical changes which would help to maintain its sustainability *vis-à-vis* upcoming demographic change. As a result the stress on prolonged working activity and abolishment of age-specific unemployment is rising within political debate and praxis. However, in 2004 Rabušic had already coined the term “the Czech retirement paradox”, showing with empirical data that even though older Czechs are aware of the facts that their society is aging, the number of pensioners is increasing, they themselves are living longer, and the prospective drop in post-retirement income is a serious threat to their standard of living, they are still not only opposed to any increase in the statutory retirement age, but more frequently they even indicate a preference for early retirement. And interestingly, Rabušic (2004) continues, research conducted among the elderly has shown that many of those who are already retired today admit that they did not really want to retire. In his article Rabušic provides two possible explanations: first, the lower perceived value of work in the society as a heritage of their communist past, and second, this paradox could be a function of role overload in (late) middle age life, where a concurrence of various roles occurs and may produce conflicts and a sense of being overburdened. In such situations the concept of early retirement may look like an attractive and socially acceptable escape route. But the reality of the aggregate replacement ratio (share of income of retirees aged 60–74 on income of working population 50–59) being around 55% in 2012<sup>2</sup> and a considerable drop in meaning and value of their social status by ceasing to be employed and becoming an old-age pensioner may give a new, more realistic perspective on life spent in retirement, spanning for today’s retirees over two decades. Given these theoretical and nation-specific policy backgrounds we will continue in following parts of the paper with an introduction of the survey and dataset and with analysis of the assumptions outlined above.

## METHODS

### DATA

The data for this study were collected as part of the “Work and the life style: Transition 2006” survey carried out in the population of the Czech Republic aged 55–65 years, i.e. those born 1941–1951. The sampling procedures followed quota prescription for sex, education level, NUT3 and size of community in order to obtain a representative sample of this particular birth cohort. While the sample is limited in its age range, it allowed us to test experience of various transitions in later mid-life, including those between work and retirement. In total 1,063 interviews were collected assisted by structured “pen and paper” questionnaires, and a very satisfactory response rate of 72% was reached.

### VARIABLES

Within the survey various types of information were collected, starting with basic socio-demographic descriptive characteristics and family status/partnering information, work

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<sup>2</sup> Source: [http://epp.eurostat.ec.europa.eu/statistics\\_explained/index.php/Social\\_protection\\_statistics](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Social_protection_statistics).



characteristics (hours worked, characteristics of the work place, values related to work *etc.*), subjective health and quality of life/ageing indicators, daily and leisure activities, and finally expectations, values and plans related to retirement, retirement transition, timing and general circumstances (preferences, ideals and plans). For this particular study only a selection of relevant variables will be presented. Tables and graphs presented below are based on the survey data. Missing answers and answers “don’t know” are treated as system missing and omitted from analyses if they represent less than 5%. As we are not using a randomly selected sample and selected sub-samples may be populated by a rather small number of cases, some assumptions for provided statistical tests may be violated and they are therefore given for illustrative purposes only.

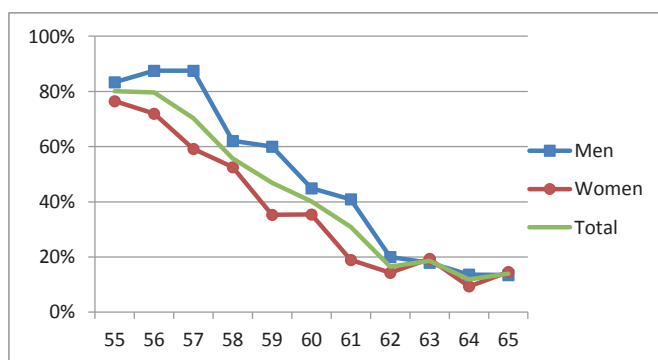
Our sample is comprised of 48% men and 52% women; 12% of respondents with primary education, 47% with secondary education without final state exam, 32% with secondary education including final state exam and 9% respondents with tertiary education. Approx. 40% of the respondents are still working, 11% are retired but continue to work, and 49% are fully retired (Tab. 2). Those still working and working retirees are more educated while those not working are more often among those with lower education, which reflects the nature of both the educational system and the labour market, where those with lower education start work earlier and therefore reach the necessary insurance period for retirement entitlement earlier, and at the same time they tend to work in more physically demanding jobs, which in time-cumulative terms may lead to worse health conditions and more often create a demand for invalidity pension and/or early retirement.

**Table 2.** Self-reported socio-economic status by gender and by education [%]

		<b>Not eligible for retire- ment</b>	<b>Didn't apply for pension but eligible</b>	<b>Retired, but contin- ues to work</b>	<b>Retired, used to work in retirement</b>	<b>Retired, not working</b>
Sex	men	51	1	7	5	36
	women	27	3	14	9	46
Educa- tion	primary	28	–	10	10	52
	secondary [-] exam	37	2	11	6	44
	secondary [+] exam	43	2	11	10	34
	tertiary	42	7	11	4	36
Total ( <i>N</i> = 1033)		38	2	11	8	41

As the statutory retirement age for men and women differs, so does the share of people working by age and gender (see Fig. 1).





**Figure 1.** Respondents working (self-report) by age and sex (column %)

QUESTION: REGARDLESS OF THE GIVEN EMPLOYMENT CONTRACT BEING “OFFICIAL” OR “UNOFFICIAL”, ARE YOU WORKING AT PRESENT?

To test our first assumption we have constructed an index based on work commitment (operationalised also as employment commitment for example by Hult and Stattin 2010), preferred (i.e. perceived as ideal) labour market exit strategy (cf. for example van Soest and Vonková (2014) or Kantarci and van Soest (2013) for a discussion on merits of stated preferences in the retirement decision surveys), and self-identification with provided life-style vignette (see Tab. 3).

**Table 3.** Operationalization of typology

	<b>Type 1 work-oriented</b>	<b>Type 2 adaptive</b>	<b>Type 3 retirement-oriented</b>
Work commitment (would work even if enough money)	yes	depends on conditions	no
Ideal labour market exit strategy	continue to work	combine work and retirement	fully retired
Life-style vignette	active (busy)	adaptive (searching)	passive (resting/relaxing)

In the surveyed population answers to the above selected questions were as follows: to the question regarding commitment to continue work in concurrence with retirement despite having enough income from the pension alone, 16% of the respondents answer yes, 30% are not sure and would make decisions based on the circumstances and 54% of the respondents claim to be not interested in continuing economic activity. There are no differences between sexes and only a slight difference among educational levels of respondents (25% of those with tertiary and only 16% of those with primary education claim to prefer to work regardless of pension income, but contingency coefficients are small and insignificant). In terms of

idealised labour market exit strategy 39% opted for full retirement at statutory retirement age, 48% prefer the option of combining an exit from the labour market when circumstances require (including earlier exit) and to continue to earn extra money at the same time. The third option, to continue to work as long as possible and after pertinent retirement to continue to work possibly in a new “second” career was the least preferred, chosen by 13% as an ideal way to organise a transition from the labour market into retirement. It is more prevalent in the highest education group and among those with higher income, while the opposite is true for those choosing their ideal as full and complete retirement. At the same time the middle category does not show much variation according those usual socio-economic characteristics of respondents.

The life-style vignettes were presented in the questionnaire as short, approx. 60-word individual self-descriptions of three imaginary (wo)men (gender sensitive language was used) talking about themselves as either being (1) a life-long active person with high agency and activity levels and outside the labour market (active/work oriented), or (2) as a person being active “by nature” but also very dependent on circumstances and mood, attentive to “what is going on” around in order to make use of the best available ways and also giving quite high priority to “well deserved rest” (adaptive), or (3) a person who is “rather calm in nature”, always fulfilling necessary tasks but giving high value to peace at home and the opportunity to get away from external demands (relaxing/retirement oriented). Four possible answers were offered to respondents:

- one of the descriptions describes me precisely,
- one of the descriptions describes me vaguely, but is the closest of all three,
- none of the descriptions fits me,
- don’t know, cannot decide.

Almost 70% of respondents were comfortable with choosing one of the vignettes, 30% precisely and 39% vaguely; 18% did not find their personalities in any of the three proposed types and 13% were indecisive (18% of those with primary education, but only 9% with tertiary). Table 4 shows the percentages representing each type.

**Table 4.** Life-style vignettes – identification with the personality type description [%]

Type	Precise fit	Vague fit	Sum
Active	35	16	25
Adaptive	29	49	40
Passive	36	35	35
Total	100 ( <i>n</i> = 303)	100 ( <i>n</i> = 389)	100 ( <i>n</i> = 692)

Based on the theoretical expectations and operationalization (Tab. 1 and 3) we combined these three variables into a summary index with satisfactory characteristics (Cronbach’s Alpha = 0.652; confirming by factor analysis with KMO = 0.659;  $p < 0.001$  and 59.2% variance explained in one factor). Figure 2 shows the distribution of the index and Figure 3

the distribution of scale collapsed into three categories presented here as typology with three possible variants: 1. “Work oriented” (26%), 2. “Adaptive” (38%), and 3. “Retirement oriented” (36%). In the following analysis we use index and typology as independent variables. The preference index in its continuous form expresses the fluidity and unclear margins of the concepts here used, where the work-oriented individuals are on one side and retirement-oriented individuals on the other with the adaptive types somehow “floating” between these two with unclear and dynamic outcomes of their decision making.

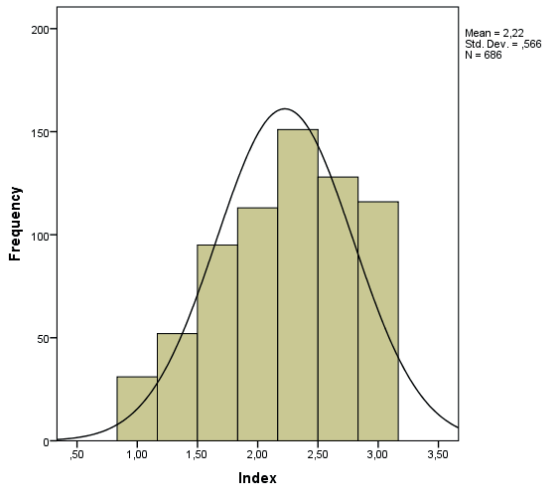


Figure 2. Histogram of preference index (no. of cases)

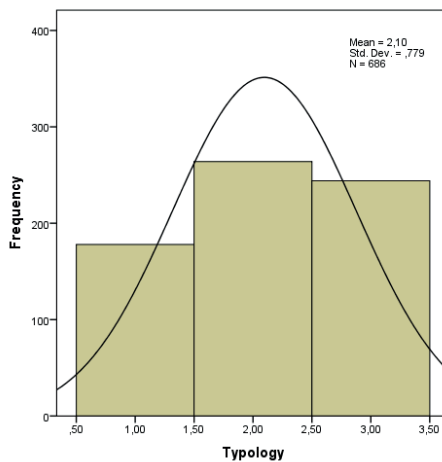


Figure 3. Histogram of typology distribution (no. of cases)

## FINDINGS

Given the theoretical background of the study, we expected normal distribution of the index and types within the older population and its weak dependence on socioeconomic characteristics, as the individual values should have stronger explanatory power over the structural background. Based on the characteristic of both index values and typology distribution we can see that the hypothesis about normal distribution has to be declined. In perfect normal distribution we would expect both characteristics of skewness and kurtosis to equal zero; here are values of  $-0.375$  (st. error 0.093), and  $-0.736$  (st. error 0.186) respectively, proving slight clustering towards higher values (i.e. retirement orientation) and a tendency to rounded distribution.

As was shown already by the analysis of input variables and their covariates, the typology is associated with income and education, but not with sex and age (within the age range of our sample). In many ways, from this particular point of view we may argue that both income and education do not stand here in a position of independent variables, but in the complexity of life cycle could be also an *outcome* of the personal preferences and values earlier in life, since more active and work-oriented people may for example tend toward to higher work engagement and therefore to earning higher incomes.

### “PREDICTIVE” POWER OF PREFERENCE TYPOLOGY – “A REALITY CHECK”

Since we do not have a longitudinal panel survey in order to test the antecedents and consequences in time, we have to rely on a simple test that will show if values/preferences-based variables are associated with the socioeconomic status of the respondent.

**Table 5.** Mean value of index and preference type by socioeconomic status of respondent

Socioeconomic status	Index			Typology [col. %]			Total [%]
	mean*	<i>N</i>	std. dev.	work-oriented	adaptive	retirement-oriented	
Pensioner, not working	2.48	267	0.46	16	37	58	39
Below retirement age	2.16	270	0.55	44	41	34	39
Ex-working pensioner	2.03	49	0.59	11	7	5	7
Working pensioner	1.82	80	0.50	23	12	3	12
Eligible but did not apply for pension	1.72	18	0.52	6	3	0	3

Note: Index values range from 1 = work-oriented to 3 = retirement-oriented. \* ANOVA  $F(4.679) = 35.11; p < 0.001$ . *Eta sq* = 0.16.

As Table 5 proves, those out of the labour market are overrepresented within the retirement-oriented category, while the work-oriented type is closely related with prolonged work activity, either with or without simultaneous withdrawal of pension benefits.

Of course, it should be more appropriate to look only at those who had already proven their preferences, since those not eligible for retirement still may have a tendency towards the retirement preferences but this escape route may be unreachable for them at the given moment (e.g. they are not eligible for invalidity pension or early pension). Therefore in the next analysis we will look separately at those who are already retired (59%;  $N = 627$ ) and those who are not (41%;  $N = 430$ ). In the survey those already retired were asked about the actual timing of their own labour market exit, while those who were yet not eligible for retirement were asked about their (future) plans concerning retirement timing (Tab. 6).

**Table 6.** Timing of retirement of retirees and exit-plans of working subpopulation (index mean score)

Timing of retirement	
Retired*	
Early exit	2.42 (+/-0.49)
At statutory retirement age	2.33 (+/-0.54)
Postponed exit	1.86 (+/-0.60)
Non-retired (plans)**	
Early exit	2.40 (+/-0.42)
At statutory retirement age	2.30 (+/-0.51)
Do not know	2.00 (+/-0.47)
Not decided	1.99 (+/-0.58)
Postponed exit	1.74 (+/-0.51)
Do not want to retire	1.78 (+/-0.53)

Note: Mean differences significant: \*  $F(2,384) = 20.96$ ;  $p < 0.001$ ;  $Eta sq = 0.098$ ; Post-hoc test comparison indicated significant difference of the mean scores for all three groups. \*\*  $F(5, 270) = 7.6$ ;  $p < 0.001$ ;  $Eta sq = 0.123$ . Group differences see Annex.

Again, we see a confirmation that respondents in both subgroups, those retired and those still in the labour force, behave, or plan to behave, in accordance with the defined typology, here represented by the index variable. Those who left the labour market earlier have higher inclination towards retirement, while those who actually left later veer toward the other end of the preference scale. That by itself could be a good indication that the preference theory should also be able to anticipate future behaviour.

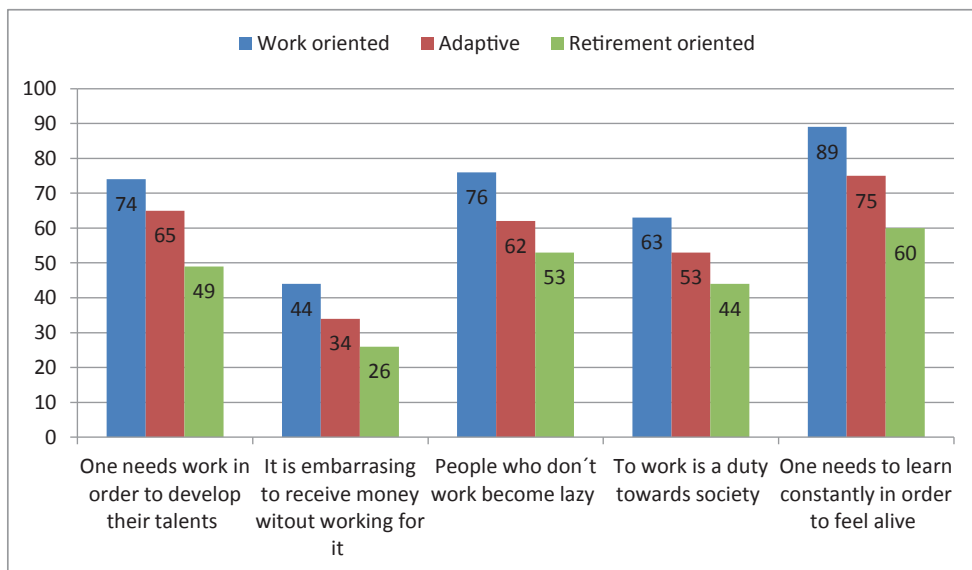
Within the non-retired subgroup the picture is likewise confirming, and (also) introduces the adaptive type to the scene: those still working but undecided or unsure about their actual exit strategy are situated, as we expected, in-between those who want to continue working

and those who want to leave the labour market at the earliest possible occasion. The results presented above therefore confirm both the identifiable existence of three separate types of value orientations in the context of work and retirement and its potential power to explain the timing of labour market exit in older workers. On the other hand, as opposed to my previous study on leisure activities (Vidovičová 2005), here the assumption of normal distribution was violated and the independence on structural socio-economic characteristics remains, due to the crosssectionality of the data and restricted sample (the sample is based only on a ten-year age-interval), unresolved.

## VALUE BASE OF THE TYPOLOGY

If we talk about typology as an expression of value based preferences, we may also have a look at the value attitudes associated with each type. In our survey five general statements about the importance of work for one's life and for society were given and respondents expressed their level of agreement with each of them with the use of Lickert's 5-point scale.

The values expressed in these statements fit the model typology very closely (coef. Gamma ranging from 0.19 to 0.44) and show that for the work-oriented work (employment) is more than just a source of income or a way of keeping busy. In Figure 4 the results also consider work and learning as a self-development tool, an important contribution to society and even a life asset.



**Figure 4.** Agreement with work-value statements (sum of “definitely agree” and “agree” options) [col. %]

## PREFERENCE TYPOLOGY IN RELATION TO RETIREMENT PLANS AND EXPECTATIONS

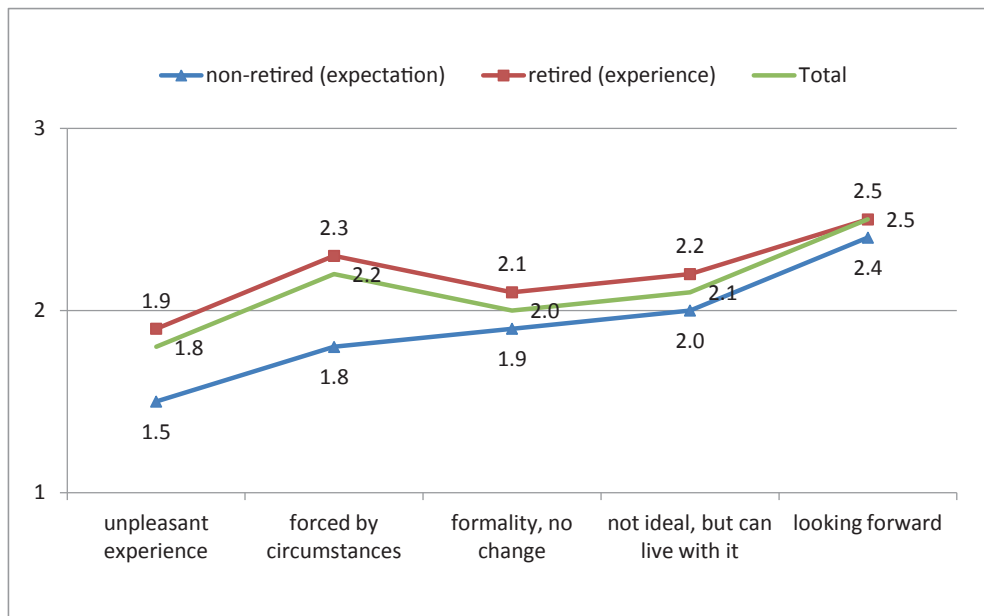
As individual values and preferences differ, so do the views of transition to retirement and retirement as such. Some workers may actually look forward to this new time in their lives, while others may be uncertain about the future, expressing their fears and negative expectations related to both time in retirement and/or progress of ageing related to this life-stage as such. In our survey we have tested these assumptions under the number four by using two indicators. The first indicator we have obtained as an answer to the question: “How would you describe your (future) transition to retirement?”. The relation to the future was again presented to those not-retired, while retirees should give a description of their actual feelings retrospectively (Tab. 7).

**Table 7.** Evaluation of the (future) transition to retirement (whole sample)

	[%]	<i>N</i>
Happy event, you have been/were looking forward to it for a long time	33.3	341
Something you will be/were rather forced into by circumstances	31.1	318
Just formality, it will/did not bring about much of a change	19.9	204
Something you would probably not choose, but could get used to/got used to	11.3	116
Utterly unpleasant experience	4.4	45
Total	100	1024

Two categories of expressed feelings on labour market exit were dominant: as a happy and long-anticipated event, and as something which came about as an externality, imposed by circumstances. In many ways these two expressions reflect the situation on the labour market as well, first as regards the abovementioned “early exit paradox” (Rabušic 2004) portraying retirement as a time of well-deserved rest and freedom, and the second concerning (early) retirement as a response to deteriorating health, decreasing employability, age discrimination on the labour market and/or competing caring responsibilities in later life. Almost 65% of respondents fitted in one of these two options. Another twenty percent of respondents have probably chosen “the formality only” option in reflection of the fact that the Czech pension system does allow for concurrence of old age pension benefits and salary without any considerable restrictions, which manifests more general policy support for later life employment. In our assumptions we have expected that these evaluations will differ among the preference types, since the act of actually becoming a retiree may carry different meanings and related evaluations.





**Figure 5.** Evaluation of transition to retirement – index score mean

Figure 5 presents mean scores on a preference index scale, separately for retirees and those still working. As we already know that the retired sub-group has a higher propensity towards the retirement-orientation (they did what they planned they would do), we should not be surprised by the two levels of results. However in this analysis we go one layer deeper, showing that even within those who are retired (for any reason) the evaluation of retirement transition differs according to their preference type, respective to their position on the preference scale. The work-oriented (fore)see their labour market exit as unpleasant or forced, while the retirement-oriented take the label of “happily expected event”.

We get confirmative results also via the second indicator based on the question: “According to you, what should your ideal life in retirement look like? How do you definitely not want to spend it?”. A list of four possible answers was presented to all respondents:

- 1) “Retirement as a time fully devoted to family or other people”,
- 2) “Life in retirement the same as before retirement, employment and many various activities”,
- 3) “Retirement as a time devoted above all to myself, to my hobbies and to self-development”,
- 4) “Retirement as a time to relax, spent watching TV, reading newspapers, no demanding activities”.

Table 8 gives the percentage of the overall preferences within the sample and mean value of preference index.

**Table 8.** Ideal and undesirable lifestyles in retirement

Ideal		Retirement...	“Nightmare”	
% in total (N = 1047)	index mean		index mean	% in total (N = 1023)
20.3	1.7	the same as before retirement	2.5	20.2
37.2	2.3	time devoted to myself	2.3	4.5
29.4	2.3	time devoted to family/other people	2.2	5.2
10.0	2.6	retirement to ”relax”	2.0	38.7
2.1	2.1	something else	2.1	9.0
0.9	2.4	none of these	2.3	22.4

Note: “Ideal”  $F(5,673) = 32.73$ ;  $p < 0.001$ ;  $Eta\ sq = 0.196$ . Variants “something else”, and “none of those” do not differ from other groups.

First, from the above results we see that the self-oriented ideal gains rather convincing priority among our sample. One may expect that it relates to the description of retirement as well-deserved time free of the demands of the surrounding social and work environment and/or caring responsibilities. The perception of ideal as to “finally have time for myself” is appealing to almost 40% of respondents. A similar percentage, on the other hand, pronounces “retirement as a time to relax”, as a void time of doing “nothing” as a undesirable way of spending one’s years after exiting the labour market – which again echoes Rabušic’s retirement paradox (2004): yes, we want to be free from work, but not workless (useless). Secondly, it is also evident that mean values of preference index for “ideal” and “nightmare” are in inverse relationship, i.e. where those retirement-oriented see an ideal, the work-oriented see a “nightmare” and vice versa.

## TPOLOGY IN RELATION TO SOCIAL POLICY AND LABOUR MARKET CONDITIONS

In this last section we turn our attention to our fifth assumption, testing whether different preference types do differ in their (hypothetical) reactions to various policy, family and labour market inputs. We anticipated that the work-oriented, retirement-oriented and adaptive types will be coherent in their attitudes and values, which will be in line with their general life-strategies. In other words, as the preference theory proposed, the two extremes should be less reactive to various external inputs than adaptive types, either because they navigate through and around the life situations in compliance with their values and preferences, or they, so to speak, force the life-situation outcomes in a preferred way, by taking some routes and ignoring others. In terms of older workers three particular areas may be of interest: retirement policies, labour market policies or job/working place characteristics, and finally family/partnership situation.

In our survey we have operationalised these into a set of twenty-four indicators (see Graph 4), including questions into the partner's timing of retirement, financial needs of children, caring responsibilities, own health condition, need for further training, possibility to adjust working conditions, changes in statutory retirement age, and similar questions. The question posed to retirees referred to the past, asking in which direction, if any, was their decision influenced by a given situation. In the case of those still on the labour market the question asked about the probability that their decision would be influenced in the near future, and in what way. Four possible answers were stipulated: either this condition/circumstance will keep/kept the respondent employed longer, it would urge him/her into earlier exit, or it would have no influence on his/her decision, either with or without a certain amount of previous consideration. These last two options can be interpreted both as “non-reactive” and “adaptive” strategies, as they do not change the previous decisions made by the respondent. At the same time these indicators do not tell us only about the preferences and behaviour of different types, but also about different degrees of impact these certain conditions may have on organisation of labour market exit and its timing in general.

The perfect fit of the preference theory model could be illustrated for example by the appearance of minor health issues and their influence on timing and general organisation of labour market exit. As Table 9 below shows, deteriorating health is a situation which does not generally urge anybody to prolong their employment status, but neither does it mean that everybody will necessarily rush from the labour market solely for that reason.

**Table 9.** The influence of (potential) minor health issues on the labour market exit by preference types [%]

	<b>Work- -oriented</b>	<b>Adaptive</b>	<b>Retirement- -oriented</b>	<b>Total</b>
Delayed exit from the labour market	5	5	2	4
Early exit from the labour market	43	45	54	48
Would consider/considered, but no change in plans	19	25	16	20
Would not change my decision; would not consider	34	24	29	28
Total	100	100	100	100

Facing minor health issues more retirement-oriented people would take the opportunity for early exit than would work-oriented individuals, who also to a greater degree do not pay attention to such issues at all (they still continue to work). On the other hand, adaptive types are slightly overrepresented in the category of those who do pay attention to such circumstances, and conversely are underrepresented in the category of those who do not consider such conditions at all in their decision. However, in practice adaptive types may be also included in previous categories of those early/late retirees as a result of finished decision processes.

In light of these results the popular belief that health issues are contributing to early exit from the labour market may be too simplistic.

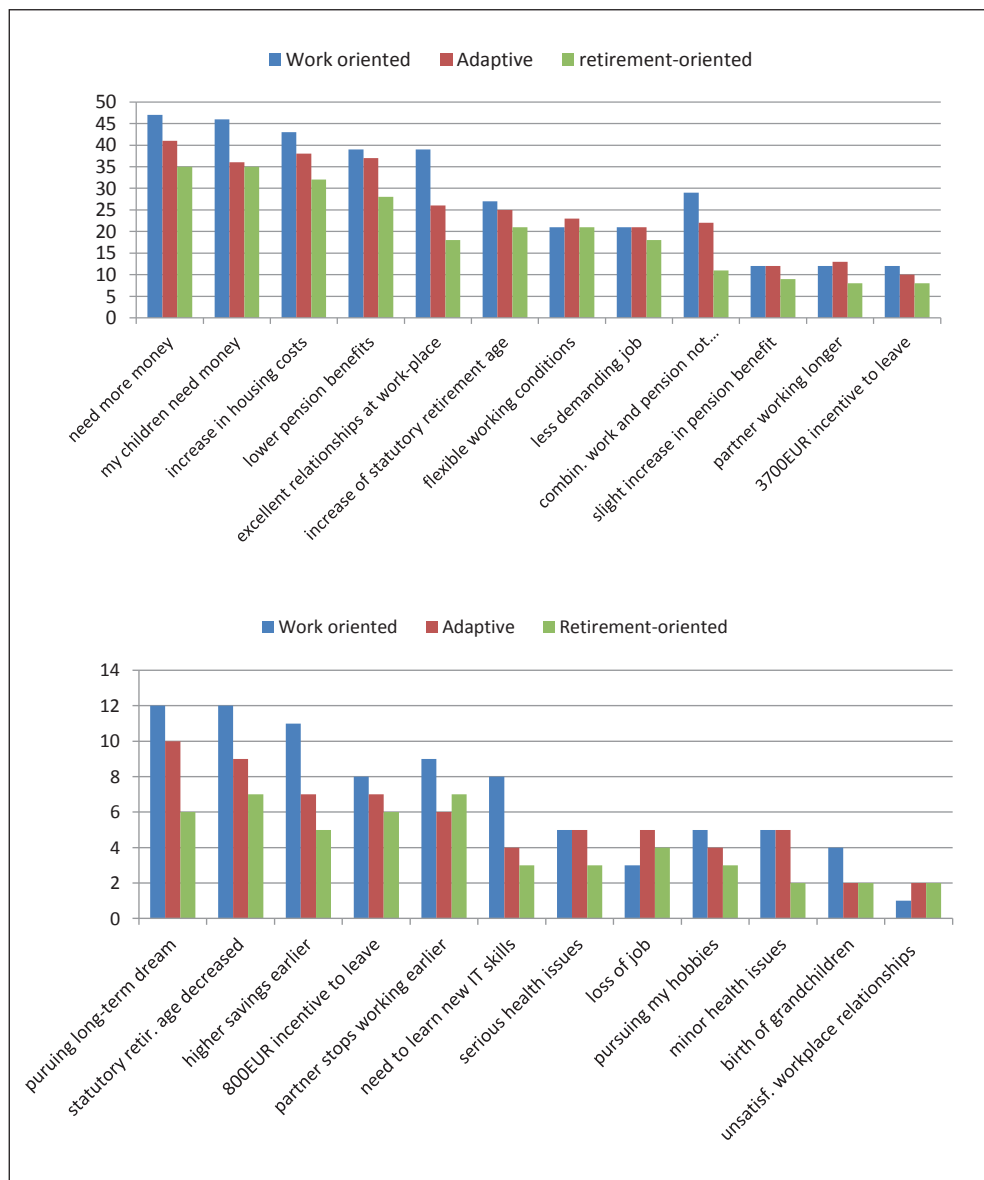
It has to be said though that there are circumstances which do not produce such typological differences. One such example could be the birth of a grandchild. Here, the minority of all three types would adjust the timing of their labour market exit and among those who would, all three types would opt for early exit rather than for prolonged working activity (Tab. 10).

**Table 10.** The influence of (potential) birth of grandchildren on the labour market exit by preference types (%)

	<b>Work- -oriented</b>	<b>Adaptive</b>	<b>Retirement- -oriented</b>	<b>Total</b>
Delayed exit from the labour market	4	2	2	2
Early exit from the labour market	13	15	17	15
Would consider/considered, but no change in plans	23	19	21	21
Would not change my decision; would not consider	60	64	61	62
Total	100	100	100	100

The conditions and circumstances which gain the least reaction towards early exit or postponement among the entire researched population (i.e. have more than 70% of all answers in the last two “not changing plans/decision” options), include, for example, the need to learn new IT skills, the opportunity to take a less demanding job, the possibility to make adjustments at the workplace, good relations at the workplace with co-workers, the possibility to combine salary and pension if benefits were abolished, partner would work longer or would leave for retirement earlier, birth of grandchildren, preference to devote more time to hobbies or a strong desire to persuade long-term dreams. On the other hand circumstances and policies such as receiving a retirement incentive of approximately 3 700 EUR, loss of a job, considerable health deterioration, or need to provide care to a family member seem to be the strongest incentives to early exit for all preference types, although, and interestingly, not to the same extent. For example while the need to provide care would push all three types out of the labour market earlier (69% of work-oriented, 66% of adaptive, and 67% of retirement-oriented), in case of sudden unemployment 76% of those retirement-oriented but only 66% of work-oriented respondents would opt for earlier exit.

In Figure 6 only those claiming to prolong labour market activity *vis-à-vis* given circumstances are shown. Here the work-oriented lead the way in the majority of cases, although the differences between them and retirement-oriented types vary, from being quite close, as in the case of rather high financial incentive to leave work, to considerably different, such as in the case of abolishment of the possibility to combine work and pension benefits, the motivational power of good relationships in the workplace or the need to learn new technologies or IT skills.



**Figure 6.** Share of those who would postpone labour market exit under given circumstance by preference type [%]

So as the fifth assumption suggested, different preference types do react to various conditions regarding work, family and/or policy in different ways, including the direct opposite, as in the case with the need to learn new IT skills. This would make/made only

13% of work-oriented types opt for early exit, but 18% of those labelled adaptive and 34% of retirement-oriented respondents. Simultaneously, 8% of work-oriented types would postpone labour market exit due to a need to upgrade their skills, but only 3% of the other two types. A quite similar situation is also evident in the case of increasing the statutory retirement age, where 27% of work-oriented respondents opt to behave in-line with the introduced policy measure, but only 21% of those retirement-oriented do so. And only 11% of the work-oriented, but 16% of adaptive and even 25% of retirement-oriented respondents claim to actually go *against* proposed parametrical pension system changes.

Partnership and family conditions at the time of making retirement decisions also produce analogous dynamics among our three types. For the sake of clarity, in Table 11 we again leave aside those who did not take those circumstances into consideration or did not change their plans in either way, and we look only at those who opt for either early or delayed labour market exit based on the timing of retirement by their partners. A clear relationship of inverse proportion in both cases of partner's retirement timing strategies is evident. Although some caution due to the small number of cases has to be exercised while interpreting these results, there are no differences according to sex of respondent, but given results seems to be more true for a sub-sample of retirees than for those still working.

**Table 11.** Respondents' reaction to partner's retirement timing ]%\_– selected results only

Sample	Partner	Reaction	Respondent			Total
			work-oriented	adaptive	retirement-oriented	
Whole sub-sample (n = 472)	Partner leaving labour market earlier	Postpone exit	9	6	6	7
		Early exit	8	13	16	13
	Partner leaving labour market later	Postpone exit	12	13	8	11
		Early exit	6	4	10	7
Retirees only (n = 263)	Partner leaving labour market earlier	Postpone exit	10	6	6	7
		Early exit	3	13	12	10
	Partner leaving labour market later	Postpone exit	11	12	5	9
		Early exit	4	2	9	2

## SUMMARY AND DISCUSSION

We have drawn a picture of values-related preferences of older workers and young retirees in order to shed some more light on the complexity of later-life roles composition and performance. We have supported the argument regarding the internal heterogeneity of

older people as a group by showing how they differ in their values and lifestyle preferences and how these influence, in this special case, outcomes in terms of labour market exit timing and sensitivity to policy. We have tested the new “lifestyle vignettes” empirical tool and followed its association with stated preferences and stated behaviour in the labour market and retirement. To little surprise, our data confirmed that work-oriented people more often work beyond the statutory retirement age and to a greater extent look at the concept of retirement with more reluctance or even disdain. In some preliminary analysis (here omitted) we also find some clues that work-oriented people tend to have a lower subjective age, better subjective health, a stronger feeling that they have personal control over their lives (feeling of agency and internal locus of control) and what could be especially interesting for future deeper inquiry, they are more active in actually preparing themselves for later life in terms of savings, a healthy lifestyle, looking for adequate housing, getting information about available social services *etc.* Our data agree with the suggestions of Kantaraci and van Soest (2013) that individuals who are attached to the labour market for non-economic reasons are significantly more likely to remain in the labour market, as here too the intrinsic value of work and activity itself seems to be the key. The work-oriented older individuals do stand out as proper active ageing models within their respective age cohorts, because according to the European Value Survey results for the Czech Republic the importance of work is highest among 30–44 year-olds (Rabušic and Hamanová 2009).

In our sample we have not found gender differences in the preference typology and related concepts, which is contrary to what some sources suggest in terms of retirement preferences and policy responsiveness (de Grip, Fourage and Montizaan 2013; Frieze, Olson and Murrell 2011; Walters 2005; Nicolaisen, Thorsen and Eriksen 2012; but see Warner, Hayward and Hardy 2010). We propose interpreting it as gender irrelevance of work value if operationalized as more general activity orientation.

In our view, one of the most interesting results of our study is the variation of policy responsiveness according to the identified typology. As opposed to aggregated results of many studies discussing older workers as a uniform group we have shown that this typology may help understand why on average active ageing policies (sometimes) do not provide expected results. Our data suggest that the sum of their impact may be (close to) zero if some typology representatives go in the intended policy direction, while others behave to the contrary. In other words, when the same incentive represents both push and pull factors, aggregate measures may show no change.

From a methodological point of view, in line with Kantaraci, van Soest (2013: 8) and other studies quoted by them, we may conclude that, also in the context of the Czech Republic, both stated preferences and life vignettes are “indicative of actual behaviour but [of course] they may differ with respect to [labour] market restrictions, individual characteristics, or other unanticipated policy interventions or life events”.

Future research should look more in detail as to how the preference typology correlates with other activities in later life, and whether it also influences performance of other roles outside the labour market, such as those of carer, volunteer or grandparent. An initial look at our data related to this question (presentation of analysis here omitted) suggests that indeed those more work-oriented are also more busy with other activities such as volunteering or



helping with grandchildren. Or as the popular saying goes: if you want to have something done, ask a busy person. It also remains for further research to fully uncover where the roots of the values behind these preferences lie, since some authors such as Radl (2013) or Hamblin (2010) may argue that social class and gender, for example, play a role in both work-value creation and in availability of exercising equal freedom of choice over labour market participation and exit. We have seen that the value of work and life-long learning is much higher for the work-oriented than for those in the retirement-oriented category, but even these values may have their (structural) explanation, which should be described more in detail in future enquiries on larger and/or panel samples. It should be also noted that the preference index and typology as such is constructed with a rather high reduction of cases, therefore much of the information may be lost and the statistical test may give overly confirmative results. However, since the results are in line with previous research in slightly different context of everyday life activities on a larger sample (Vidovičová 2005) and they do relate to socio-demographic and socio-economic characteristics in an expected and logical way, we may dismiss these concerns until larger surveys in the future prove otherwise.

We have proven that the typology is sex- and age-neutral (within our age-limited sample), but there are some associations with the education and income of the respondent. We have argued however, that reverse causality may be taking place, as work-oriented people may tend to earn higher incomes. De Neve and Oswald (2012) have proven that using data from a large US representative panel where adolescents and young adults who reported higher life satisfaction or positive effects grew up to earn significantly higher levels of income later in life. In their study De Neve and Oswald included controls such as education, intelligence quotient, physical health, height, self-esteem, and later happiness and have shown both direct and indirect effects that carry the influence from happiness to income, namely higher probability of obtaining a college degree and being hired and promoted, having higher degrees of optimism and extroversion, and lower levels of neuroticism. In a very similar way we may hypothesise that this “pre-destination” also works later in life, and softer indicators, such as happiness or work-related values, can be in a position of cause rather than of consequence.

Two important features should be repeated here. First the preference typology as it is defined and empirically proven here is not an evaluating approach. By no means are we suggesting that work-oriented individuals are “better” than the retirement-oriented, although the public policy clearly stresses the importance of continuous activity and the work-oriented group can serve as a kind of role model for the success of such policies. Older people – in our opinion – should have an opportunity to pursue their values and life-style preferences in either way. What we may have to strive to prove is that in many ways the policy battle for active ageing should be kept in the wide “adaptive” arena, where the greying workforce could be won at lower expenses and greater profit.

Secondly, it is important to underline that general preference theory and its application should be regarded and applied in its limited time frame, as it has its own temporality. Eventually, the absolute majority of women terminate biological reproduction at a certain age and, likewise, the majority of older workers end up in full retirement. The age interval could be rather wide and, as we have seen, predetermined by selected characteristics, values, and preferences, but only certain outliers work in paid employment until late death. That could also

be a reason for the unexpected skewed distribution of the typology in researched population towards the retirement orientation. That would, however, also challenge the independency of the types on age, as it was found here.

When trying to understand the preference and value determinants for later life and especially labour market commitments in Czech society, we agree with Lesthaeghe and Moors (2002) that values could hold both predictive power relative to later decisions and at the same time be adaptable in function of earlier decisions (events determine adaptation of value orientations), and that should lead to encouraging interest in these aspects of individual decision-making and their careful consideration when talking about active ageing and preparing our societies for their grey future.

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## ANNEX

**Table I.** Post-hoc comparisons using the Tukey HSD test for Table 6 in the text

	<b>Early exit</b>	<b>At statu- tory RA</b>	<b>Do not know</b>	<b>Not de- cided</b>	<b>Post- poned exit</b>	<b>Do not want to retire</b>
Early exit					×	
At statutory RA			×	×	×	×
Do not know		×				
Not decided		×				
Postponed exit	×	×				
Do not want to retire		×				

## TEORIA PREFERENCJI W ODNIESIENIU DO STARSZYCH PRACOWNIKÓW W CZECHACH

W artykule wykorzystuję teorię preferencji (Hakin 2000) w kontekście godzenia pracy i życia rodzinnego w celu wyjaśnienia różnych wzorów przechodzenia na emeryturę i satysfakcji z życia na emeryturze w Czechach. Twierdzą, że wiedza na temat wartości i preferencji związanych ze stylem życia ułatwia udzielenie odpowiedzi na pytanie o to, dlaczego niektórzy pracownicy kontynuują pracę (mimo nabycia praw do emerytury), a inni przechodzą na emeryturę tak szybko, jak to możliwe. Trzy typy pracowników zostały wyróżnione wśród osób w wieku 55–65 lat: zorientowanych na pracę, zorientowanych na emeryturę, adaptacyjnych. Dane wskazują na to, że samookreślenie się respondentów jako zorientowanych na aktywność lub jako zorientowanych na odpoczynek jest powiązane z aktualną aktywnością respondentów na rynku pracy. Wskazane różne typy starszych pracowników w odmienny sposób oceniają wyjście z rynku pracy. Co więcej, respondenci należą do różnych typów różnią się w zakresie reakcji na polityki regulujące rynek pracy, przechodzenie na emeryturę oraz życie rodzinne/partnerstwo. W części artykułu poświęconej dyskusji nawiązują do *active ageing* jako polityki, która jest zbyt uniwersalna, i sygnalizują, że większa uwaga powinna być poświęcona roli jednostkowych wartości i preferencji.

Słowa kluczowe: preferencje, starsi pracownicy, emerytura, *active ageing*, aktywność na rynku pracy