The Ageing Workforce and Employers in Fife

Dr Valerie Egdell, Dr Tao Chen, Dr Gavin Maclean and Professor Robert Raeside
Employment Research Institute, Edinburgh Napier University

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Edinburgh Napier
UNIVERSITY

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The Ageing Workforce and Employers in Fife: Executive Summary

Introduction

The Scottish population is ageing. This will have a significant impact on labour market and employment practices. Increasing numbers of older workers (those aged 50 plus) are remaining in work as a result of the abolishment of the Default Retirement Age and the rising State Pension Age. Many would like to work beyond the standard retirement age because of economic and social reasons, although they might wish to work more flexibly. Employers play a crucial role in facilitating the extension of working lives.

The aim of the research was to investigate current knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife. The research was carried out by the Employment Research Institute at Edinburgh Napier University. The research methods involved the following stages:

- Secondary data analysis to describe the age demographic of the Fife workforce.
- An online survey of Fife employers to gather information on business awareness of population ageing; policies and practices; health, safety and wellbeing; and information, support or advice requirements.
- Six case studies of workplace practice. Individuals who had managerial roles were interviewed, as well as employees aged 50 plus.
- An action planning workshop to gain feedback on the research findings, and to co-produce the action plan and recommendations.

Research findings

The **secondary data analysis** revealed that Fife's population is ageing. By 2039 both the 30-49 years and the 50-64 years age groups will have decreased in size. In Fife more than 20% of those aged 51-64 are retired, although 42.9% of those aged 51-64 are working full time.

There were 172 usable responses to the **online survey of employers**. The top three activities of the workplaces completing the survey were: 'Human health and social work activities', 'Manufacturing' and 'Education and training'. Most were in the private sector, and the majority employed 50 individuals or less.

Over 60% of respondents to the online survey of employers agreed that the staff profile of their workplace was getting older. However, a large proportion disagreed that there were

established policies to manage the effects of an ageing population or that policies and practices were being reviewed or developed.

Respondents to the online survey of employers were presented with a number of statements about benefits and challenges for having older workers in the workplace. The top three advantages of having older workers in the workplace were considered to be their experience, reliability, and skills and knowledge. The most challenging aspect was that older workers could not easily adapt to new technology.

Few respondents to the online survey of employers (below 30%) believed that changes would be required to policies, practices and procedures if the number of older workers increased substantially. Nearly two thirds (62.3%) of respondents to the online survey of employers would welcome information, support or advice on the ageing workforce and older workers; 37.7% did not want information, support or advice.

The overriding message from the **managerial interviews** was that managers tended to think about employees in terms of the individual rather than their age. Age was not felt to be relevant as such, and the needs of workers were dealt with on an individual basis.

The managerial interviews revealed a range of generally positive attitudes towards the abilities of older workers. Technology was cited in some instances as presenting barriers to older workers. While explicit consideration of the suitability of the workplace for older workers had not been made and age management policies were generally lacking, it could be argued that because some workplaces offered flexible working and opportunities for lighter duties, that age friendly practices were being employed.

The **employee interviews** revealed that only a small minority of those interviewed considered themselves to be older workers. Few of the older workers felt that their workplaces would need to make substantial changes to their work or their workplaces in order to cope with the ageing population. Physical limitations however were generally discussed as a barrier to continued participation in the workplace. The research found that in some cases ageing was managed at the level of employees, and below official management policies.

Policy/practice recommendations and actions

1 – Awareness raising activities
Activities need to be undertaken in order to raise awareness with employers in Fife of the impact of population ageing on the workplace. The ageing workforce needs to be promoted

as an issue that employers need to actively engage with. One way in which to promote engagement is to stress the 'business case'.

2 – Mapping the resource base
The existing resource base needs to be mapped in order that efforts are not duplicated, so employers can be appropriately signposted to existing information, support and advice, and different providers can work collaboratively.

3 – Identifying workplaces with high proportion of older workers
The workplaces with high proportions of older workers need to be identified in order to target awareness raising activities, and consideration needs to be made of the best way to engage with employers.

4 - Policies and practices that are 'good for all ages'
All employees are ageing and the research findings suggest that employers focus on the individual rather than their age. Employers should be supported to develop policies and practices that are 'good for all ages'.

5 – Countering negative stereotypes
Employers need to be supported to untangle performance issues from ageing related issues. Therefore, alongside awareness raising activities, it may be appropriate to develop a toolkit for employers to make this assessment.

6 – Framing the extension of working lives as an asset
Employers value the skills and experience that older workers bring. Any awareness raising activities etc. need to be framed in terms of seeing the extension of working lives and population ageing as an asset.

7 - Providing information, support and advice regarding retirement and good practice
There is a need to provide information, support and advice regarding retirement and good practice examples (especially for work that is physically strenuous, where there seems to be concern that older workers are less able take on these roles).

Chapter 1: Introduction

1.1.   The aim of the research was to investigate the current knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife. This includes increasing understanding of what workplaces in Fife need to maintain and improve economic sustainability, the safety and wellbeing of workers, and business continuity.

1.2.   The research was carried out for the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance by the Employment Research Institute at Edinburgh Napier University.

1.3.   Fife Health and Wellbeing Alliance is a partnership between NHS Fife, Fife Council, Fife Voluntary Action and the Fife Health and Social Care Partnership. The Alliance has the responsibility for linking with other partnerships, local and national organisations and communities in Fife to take forward the Fife Health Inequalities Strategy 2015-2020. The three themes the strategy is working to achieve are:

- Changing the way organisations work;

- Supporting healthier lives for individuals and families; and

- Creating healthier places and communities.

1.4.   As part of the Health Promotion service within Fife Health and Social Care Partnership, the Workplace Team is responsible for locally implementing the workplace health, safety and wellbeing agenda across all sectors and industries of employment in Fife. The objectives of the team are to:

- Support the local needs of Fife workplaces;

- Work in partnership to develop and deliver innovative workplace interventions;

- Develop and increase the competency, capacity and sustainability of health, safety and wellbeing with in Fife workplaces; and

- Deliver Healthy Working Lives core services.

Research aims and objectives

1.5.   This research sought to better understand the issues surrounding the subject of ageing workforces in Fife, with a particular focus on workplace health, safety and wellbeing.

It helps to determine employers' understanding of the economic and business continuity impact that the ageing workforce and older workers have on their businesses. For workers, the research examined how they were currently managed and how they could be better supported.

1.6.   The following five research objectives were addressed:

Objective 1.   Describe the age demographic of the Fife workforce, with particular focus on age 50 and over.

Objective 2.   Establish a baseline of knowledge that exists currently around ageing workforce including: the impact employers see on their business of having an ageing workforce; to understand current management of ageing workers with a particular focus on attitudes to health, safety and wellbeing to older workers; and to determine current awareness of resources and advice availability.

Objective 3.   Identify the support employers currently put in place for older workers.

Objective 4.   Understand what are the main priorities for employers to enable them to support older adults.

Objective 5.   Identify the types of services and support needs that will enable organisations in Fife to address these priorities.

Population ageing and employment

1.7.   It is well established that the Scottish population is ageing. In Scotland the number of people of pensionable age and over[1] is projected to reach 1.36 million by 2039 (an increase of around 28% compared with 2014 when this figure stood at 1.06 million) (National Records of Scotland, 2015).

1.8.   The potential implications of population ageing in terms of health and social care provision have been extensively debated. But population ageing will also have a significant impact on labour market and employment practices. As asserted by Nicholson et al. (2016, p. 2) *"as older workers will constitute a greater proportion of the available workforce employers will need to adapt to accommodate the different needs of an older workforce"*. It is the impact of an ageing workforce on the workplace that is the key issue addressed in this research.

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[1]The figures for pensionable age and over take into account the changes State Pension Age set out in the 2014 Pensions Act (HM Government, 2014).

1.9.   The World Health Organisation identified the workplace as an important setting to support the promotion of health and wellbeing in 1981 with the introduction of the *Health for All* strategy (World Health Organization, 1981), and this was further recognised in the Ottawa Charter 1986.[2] Since then the workplace has been a prominent setting for addressing health inequalities in society through promotion of occupational health, safety and wellbeing with a number of UK and Scottish Government strategies and initiatives dedicated to this topic (for example Healthy Working Lives[3] and the policy objective of the Marmot Review to create *"fair employment and good work for all"* [4]).

1.10.   Increasing numbers of older workers (defined as those aged 50 plus by the Department for Work and Pensions (2014)) are remaining in work. In the UK, in the final quarter of 2014, 75.3% of people aged between 50 and State Pension Age were participating in the labour market, along with 12.1% of people beyond State Pension Age (Penfold & Foxton, 2015). The abolishment of the Default Retirement Age in 2011 (HM Government, 2011) and the rising State Pension Age (HM Government, 2014) are both contributing to the extension of working lives.

1.11.   The Scottish Government's 2007 strategy for an ageing population - *All Our Futures: Planning for a Scotland with an Ageing Population* - includes a vision that *"people are enabled to continue to work for as long as they want or need to, in the way that suits them best, supported by flexible approaches to employment and retirement"* (Scottish Executive, 2007, p. 5). The business case of employing older workers in terms of retention of experience and firm-specific knowledge, reduction in skill shortages, the lowering of recruitment and training costs, and meeting customer demand for an age-diverse workforce is also publicised to employers (Altmann, 2015). Thus there is greater need for employers to employ relatively more older workers, extend people's working lives and increase the productivity of all workers (McQuaid, 2007; Raeside & Khan, 2008).

1.12.   As well as the demographic and legislative drivers, many older workers would like to work beyond the standard retirement age because of economic and social reasons, although they might wish to work more flexibly (Bennett, Beehr, & Lepisto, 2016; Chartered Institute of Personnel and Development, 2008). In 2014, 49.5% of all people working past State Pension Age did so because they were not ready to stop work and 16.8% because they had to pay for essential items (Penfold & Foxton, 2015).

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[2]www.who.int/healthpromotion/conferences/previous/ottawa/en/
[3]Healthy Working Lives is a programme of work in Scotland in relation to protecting and improving the health of those in work. It works with employers to enable them to understand, protect and improve the health of their employees. For further information see: www.healthyworkinglives.com/
[4] See: www.instituteofhealthequity.org/projects/fair-society-healthy-lives-the-marmot-review

1.13.   Employers play a crucial role in facilitating the extension of working lives. While later life working is being encouraged by government; older workers still face age prejudices and stereotypes in the workplace (Fuertes, Egdell, & McQuaid, 2013; Loretto & White, 2006a, 2006b). Stereotypes about older workers are pervasive. Commonly held views include the belief that older worker are less motivated, are less keen to participate in training and/or develop, are less willing to change, are less productive and do not have up to date skills and qualifications (Naegele & Walker, 2006; Ng & Feldman, 2012; Porcellato, Carmichael, Hulme, Ingham, & Prashar, 2010; Zheltoukhova & Baczor, 2016). However, these stereotypes are generally not consistent with the research evidence (Nicholson et al., 2016). Research also has identified positive views towards older workers in terms of being highly skilled and experienced, having a positive attitude, and going above and beyond the job requirements (Zheltoukhova & Baczor, 2016). Even if employers expect labour market shortages, they do not see older workers as a major solution (Van Dalen, Henkens, & Schippers, 2009). Cultural lag means that employers may be slow to recognise that medical advances allow, and labour force trends may require, the extension of working lives (Taylor and Walker, 1998). Indeed, in most jobs declining health has little or no impact on performance; and roles and working environments can be adjusted (Nicholson et al., 2016). In summary, *"whilst we have seen a growth in number of older workers, our economy still loses billions due to the underemployment of older people who would prefer to keep working"* (Ready for Ageing Alliance, 2016, p. 5).

1.14.   The experiences of older workers are not homogenous across workplaces. Certain sectors/industries in particular are associated with poor practice towards older workers. While the construction sector has a high proportion of workers aged 55 plus, attitudes to older workers in the sector are mixed, with hazardous age discrimination practices in some businesses – although there are examples of good practice (McNair & Flynn, 2006a; Peters, 2011). On the other hand, the health and social care sector also generally has an older workforce, but there are largely positive attitudes to the older workforce, although hazardous practices may exist (McNair & Flynn, 2006b).

1.15.   It is important that attention is paid to the age management policies that employers have in place, paying attention to any gaps that may exist between policy and practice. Age management policies and practices are used to combat age barriers and/or promote age diversity, and to maintain the capability of workers. The measures cover amongst other things: recruitment; learning and continuing development; job flexibility; health protection and promotion, and workplace design; comprehensive benefits packages; and employment exit (Naegele & Walker, 2006; Nicholson et al., 2016; TAEN, 2007).

1.16.   Age management policies and practices are not equal across workplaces. Examples of good practice in age management are often drawn from large organisations such as Asda, JD Wetherspoon and Centrica - although there are exceptions (see for example Department for Work and Pensions, 2013). The experience of age management in small and medium sized enterprises (SMEs) and microenterprises may be very different.[5] The Fife business base is dominated by SMEs, with 96% of Fife's businesses employing fewer than 250 employees. The majority of these are micro-enterprises (Fife Council, 2015). SMEs face a specific set of issues when implementing age management policies and strategies. They may have fewer human and capital resources, less formalised and strategic approaches, and fewer opportunities for flexible working (Atkinson & Sandiford, 2015; Fuertes et al., 2013; Maxwell, Rankine, Bell, & MacVicar, 2007).

Structure of the report

1.17.   The remainder of this report is structured as follows:

- Chapter 2 outlines the research methods;

- Chapter 3 presents the results of secondary data analysis undertaken to describe the age profile of the Fife workforce;

- Chapter 4 presents the results of an online survey conducted with employers in Fife;

- Chapters 5 and 6 present the results of employer case studies;

- Chapter 7 discusses the implications of the findings;

- Chapter 8 presents the policy/practice recommendations and actions; and

- Chapter 9 outlines the conclusions.

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[5] The European Commission determines an enterprise to be an SME or microenterprise by taking into account staff headcount and either turnover or balance sheet total:

Company category	Staff headcount	Turnover	or	Balance sheet total
Medium-sized	< 250	≤ € 50 m		≤ € 43 m
Small	< 50	≤ € 10 m		≤ € 10 m
Micro	< 10	≤ € 2 m		≤ € 2 m

Source: What is an SME? http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en

Chapter 2: Methods

2.1.   A mixed methods approach was used to ensure that evidence gathered could be presented in a coherent and logical manner that was meaningful to the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance, as well as other key stakeholders. Emphasis was in particular made on gathering data from SMEs. The research had four stages.

Stage 1 – Secondary data gathering

2.2.   Secondary data analysis to describe the age profile of the Fife workforce, with particular focus on age 50 and over, was undertaken.

2.3.   Population projection data for Fife available from the National Records of Scotland was analysed in order to understand how the age structure of the population is projected to change. Based on these projections the implications for employers in Fife were considered. Secondary data, available through the Annual Business Survey and the Scottish Household Survey were also analysed in order to present a picture of labour supply, employment by occupation, labour demand, employee jobs and business size and sector in Fife.

Stage 2 – Online survey

2.4.   An online survey was sent to employers in Fife. The aim was to get responses from around 200 employers, representative of the range of employers in Fife, the majority of which have less than 50 staff, and including representation from all sectors, and reflecting a range of industries.

2.5.   The survey questions were developed using the literature, including: the Workplace Employment Relations Study Management Questionnaire 2011[6]; Chartered Institute of Personnel and Development (2014); Barnes et al. (2009); Metcalf and Meadows (2010); Jensen and Møberg (2012); Mercer (2015); Gringart et al. (2013); and Taylor and Walker (1998).

2.6.   The survey gathered information on business awareness of the ageing population; policies and practices; health, safety and wellbeing; and support or advice requirements in the workplace (a copy of the survey can be found in Appendix 1). It contained questions on the current workforce profile, and the following topics, taking a particular focus on workplace health, safety and wellbeing:

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[6] https://www.gov.uk/government/publications/the-2011-workplace-employment-relations-study-wers

- Current and planned policies focused on older workers;

- Human resource and other practices towards older workers;

- Attitudes towards older workers; and

- Awareness of resources and advice availability.

2.7.   In order to identify employers to distribute the survey to, the following sources were mined: the FAME database, which contains comprehensive information on companies in the UK and Ireland; the Fife Business Directory, available through the Fife Council website; and the Green Business Fife Directory. In total 1260 emails with the survey link were sent directly to businesses in Fife (with 1052 successfully delivered).

2.8.   In addition, a range of organisations representing businesses in Fife were asked to distribute the survey to their members, and the survey was advertised using Twitter, LinkedIn and Facebook.

2.9.   There were 188 responses to the survey. Of these, six respondents did not agree to take part in the survey and another six stated that their workplace was not based in Fife. Therefore, there were 172 valid responses left for analysis.

2.10.   The online survey data was used to produce descriptive statistics, and statistical analysis was conducted using Pearson's chi-squared test, multi-factor crosstabs, t-tests and ANOVA.

Stage 3 – Case studies of workplace practice

2.11.   Workplaces participating in the online survey were asked to indicate if they were happy to take part in follow up interviews, in order to develop case studies of workplace practice. In addition, to ensure that these case studies represented the diversity of employers in Fife, the FAME database and the Fife Business Directory were also mined to identify potential case study workplaces.

2.12.   Six workplaces participated in the case studies – these included workplaces who indicated in the online survey that they were happy to take part in follow up interviews, and workplaces identified through the FAME database and the Fife Business Directory who were contacted directly. Using the Standard Industrial Classification of Economic Activities (SIC) 2007[7] classification the sectors represented in the case studies are: 'Transportation and storage'; 'Professional, scientific and

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[7]www.gov.uk/government/uploads/system/uploads/attachment_data/file/455263/SIC_codes_V2.pdf

technical activities'; 'Manufacturing'; 'Real estate activities'; 'Education, human health and social work activities'; and 'Wholesale and retail trade'. The six workplaces were of different sizes and included SMEs.

2.13. To develop the case studies, the research team undertook workplace visits and conducted semi-structured interviews with:

- Twelve individuals from the six workplaces who had roles that can be described as: managing director/business owner, HR manager, line/general manager and/or occupational health roles. In some instances, due to the size of the workplace, some of those interviewed occupied one or more of these roles. Throughout this report these interviews will be described as 'managerial interviews' and the participants as 'managerial participants'. The findings from these interviews are presented in Chapter 5.

- Seventeen employees from the six workplaces who were aged 50 plus (older workers). The findings from these interviews are analysed and presented separately from the managerial interviews, in Chapter 6.

2.14. The interviews gathered information on attitudes and policies/practices towards older workers with a particular focus on workplace health, safety and wellbeing. Information was also gathered regarding opinions of the impact of demographic trends (copies of the participant information sheet, the consent forms and interview schedule can be found in Appendices 2, 3 and 4).

2.15. All interviews were audio recorded with the participants' permission, and transcribed. Content analysis was applied to identify key themes in the data.

Stage 4 – Action planning workshop

2.16. The aim of the action planning workshop was to gain feedback on the findings from the online survey and employer case studies from the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance and other relevant stakeholder groups.

2.17. The workshop was held on 06 December 2016 and attended by a range of stakeholder groups including: NHS Fife, Fife Council, Business Gateway Fife, Fife College and Fife Voluntary Action. Ahead of the workshop, attendees were sent a short summary of the key research findings to enable them to prepare for the discussions at the workshop, specifically:

- Feedback and comments on the research findings;

- Priority areas for action;

- The types of services that will enable organisations in Fife to address the priorities identified in the research; and

- Based on the research findings and their experience, what actions and policy recommendations should be prioritised.

2.18. The workshop was structured as follows. After welcome and introductions from the Workplace Team, Fife Health and Social Care Partnership, the research team gave a presentation that outlined the aims and rationale of the research, the research methods, and the key research findings. Attendees were then invited to offer comment based on the research findings and their knowledge and experience.

2.19. The research team then presented initial actions and policy recommendations identified by the research team. These were used to get the second part of the workshop underway which centred on small group discussions. Attendees were asked to divide into groups and consider the following questions:

- What are the types of services that will enable organisations in Fife to address the priorities identified in the research?

- Based on the research findings and your knowledge/experience, what actions/policies should we prioritise taking forward?

  o What benefit will this action/policy have?
  o Who should be responsible for implementing this action/policy?

2.20. Attendees were then invited to provide oral and written feedback

2.21. This workshop was a key aspect in preparing this report. The discussions at the workshop feed directly into this report (specifically the policy/practice recommendations and actions presented in Chapter 8 are grounded both in the research findings and the relevant discussions from the workshop). Co-producing the action plan and recommendations in this way ensures that they are relevant, appropriate and speak to the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance and other relevant stakeholder groups who may use the research findings to guide their work.

Chapter 3: The age demographic of the Fife workforce

3.1.   Drawing on secondary data analysis this chapter describes the age profile of the Fife workforce, with particular focus on those aged 50 and over. Population projection data was analysed in order to understand how the age structure of the population is projected to change. Secondary data on labour supply, employment by occupation, labour demand, employee jobs and business size and sector in Fife are also presented.

Current and projected population in Fife

3.2.   This first section considers the current and projected population in Fife, with comparison made to Scotland as a whole. The most recently available data from the National Records of Scotland was used. The most recent regional estimates by age and sex were for 2015. The most recent population projections by region were for 2014. A more detailed analysis of the current and projected population by Fife sub-council areas can be found in Appendix 5 (it should be noted however, that the most recent data by sub council area were for 2012).

3.3.   In terms of population, Fife is the third largest council area by population in Scotland, accounting for 6.9% of the total population of Scotland (National Records of Scotland, 2016; Scotland Excel, 2016). Figures from the National Records of Scotland show that in 2015 the population for Fife stood at 368,080. This represented an increase of 0.2% from 367,250 in 2014 (National Records of Scotland, 2016).

3.4.   In 2015 40.2% of the population in Fife was aged 50 and over. The proportion of those aged 50 plus was larger than that for Scotland as a whole where 38.6% of the population was aged 50 and over in 2015. Similarly persons aged 60 and over made up 25.8% of the population of Fife; whereas only 24.2% were aged 60 and over if one considers Scotland as a whole (National Records of Scotland, 2016).

3.5.   There is a slight gender imbalance in the population in Fife. In 2015 51.6% of the Fife population was female. Looking at different age groups, in 2015 the female to male ratios show that the gender imbalance begins to show at later years. For example of 60 to 65 year olds there were 1.07 times as many females than males (National Records of Scotland, 2016).

3.6.   Detailed population comparisons by age between Fife and Scotland in 2014 (the base year for population projections) are displayed in Figures 3.1 and 3.2.

Figure 3.1 Population pyramid for Fife, 2014
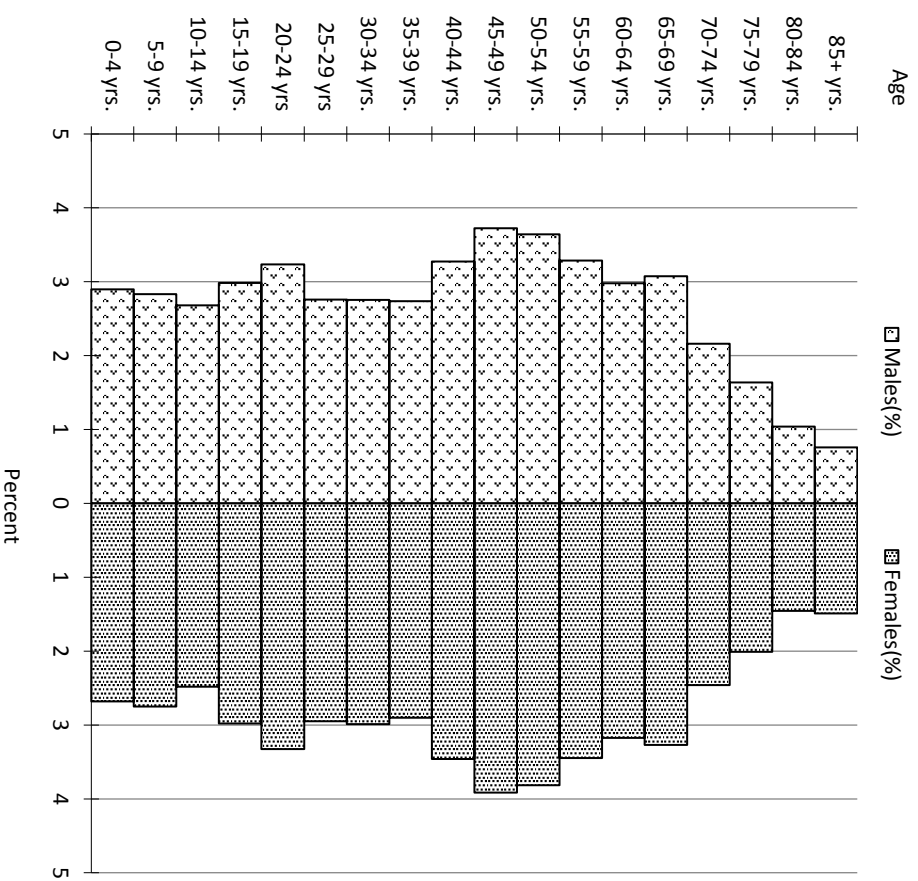
Source: National Records of Scotland

Figure 3.2 Population pyramid for Scotland, 2014
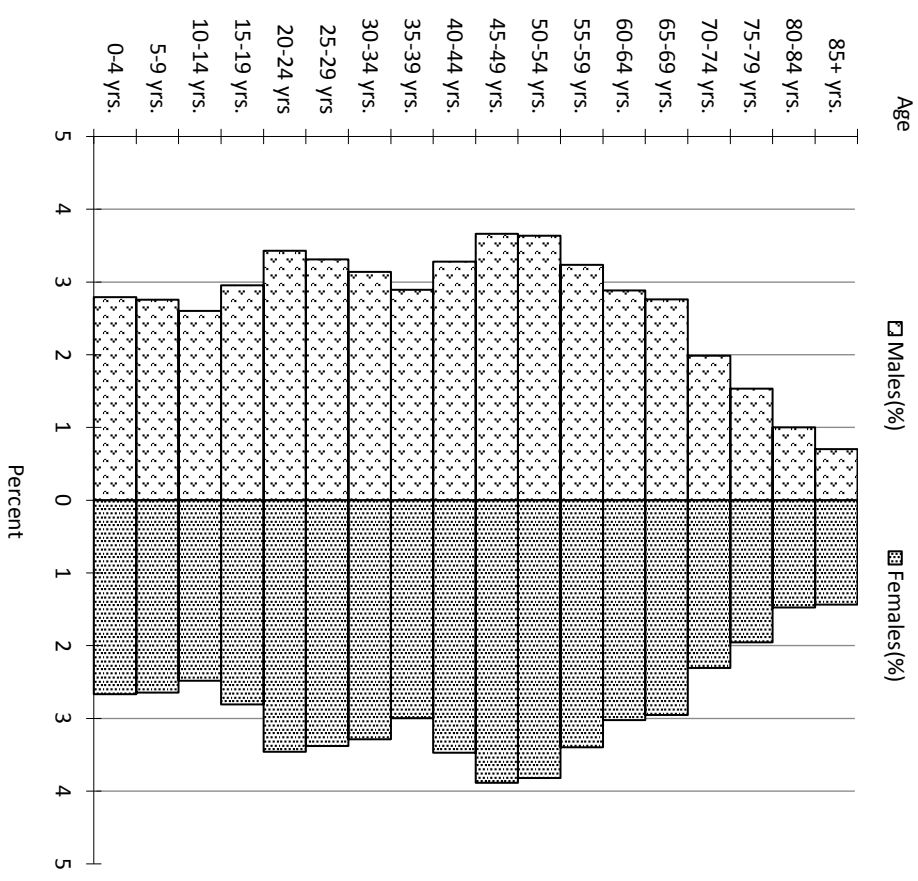
Source: National Records of Scotland

3.7.   By 2039 the population of Fife is projected to increase to 386,963 (see Table 3.1), an increase of 5.4% compared to the population in 2014. This increase is smaller than that projected for the population of Scotland as a whole, which is projected to increase by 6.6% between 2014 and 2039 (National Records of Scotland, 2015).

3.8.   Table 3.1 details that over the 25-year period between 2014 and 2039, the age group that is projected to increase the most in Fife is the 75 plus age group (91.2%, compared to 85.4% for Scotland as a whole); followed by the 65-74 age group (21.9%, compared to 27.4% for Scotland as a whole). As shown in Table 3.1 the 16-29, 30-49 and 50-64 age groups in Fife are projected to decrease in size.

Table 3.1 Projected population, by age group, in Fife, 2014-2039

Age group	Base year	Projected years					Increase (%)
	2014	2019	2024	2029	2034	2039	2014-2039
0-15	64,070	65,052	65,374	64,723	65,041	65,089	1.6
16-29	62,814	60,775	59,285	59,824	61,169	61,147	-2.7
30-49	94,573	88,649	87,002	88,707	87,273	86,836	-8.2
50-64	74,176	79,205	78,927	72,714	67,399	65,898	-11.2
65-74	40,268	43,359	43,941	48,157	51,252	49,090	21.9
75+	30,809	34,559	42,176	47,333	52,710	58,903	91.2
All	367,250	371,599	376,705	381,458	384,844	386,963	5.4

3.9.   Detailed population projection comparisons between Fife and Scotland in 2039 are displayed in Figures 3.3 and 3.4. These figures point to the persistence of the gender imbalance identified earlier in the chapter. The 45 years and over age groups in Fife will be made up of more females than males. The same trend will be replicated for Scotland as a whole.

Figure 3.3 Population pyramid for Fife, 2039

Source: National Records of Scotland

Figure 3.4 Population pyramid for Scotland, 2039
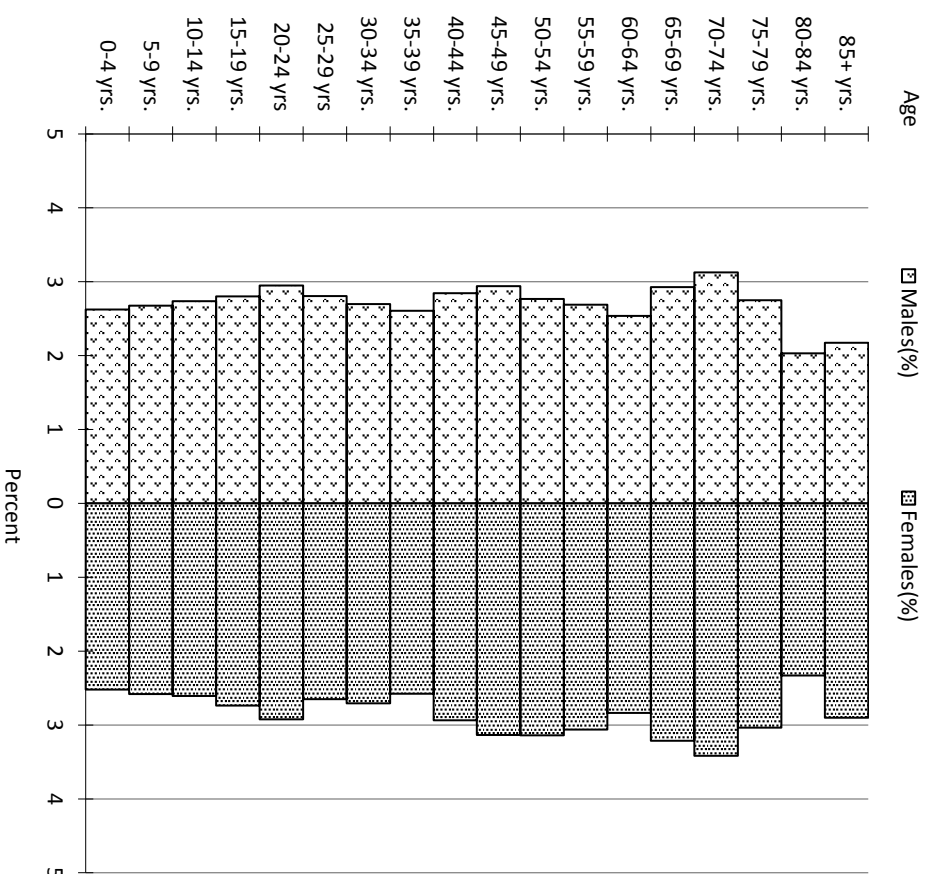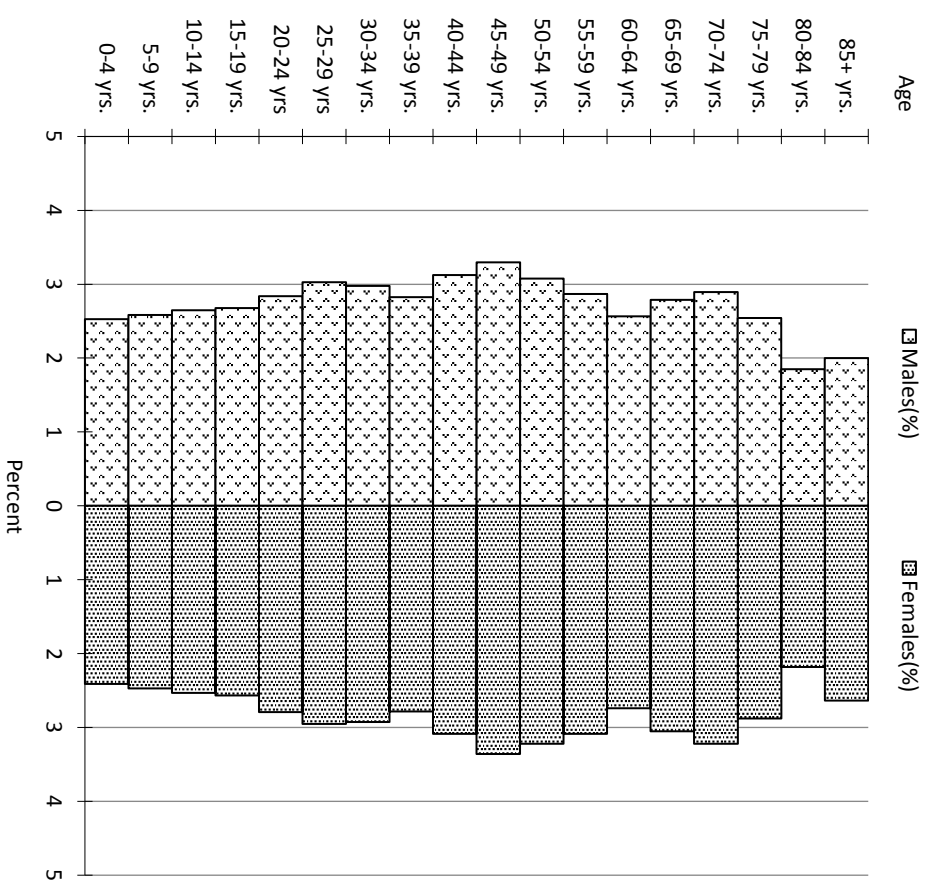

Source: National Records of Scotland

Fife's business profile

3.10.   In Table 3.2 the business profile of Fife is presented in terms of number of units per business sector and share of that sector, employment and Gross Value added (GVA). GVA measures the contribution to the economy of each individual producer, industry or sector and is an estimation of contribution to gross domestic product. Specifically, GVA measures the contribution of each economic unit by estimating the value of an output (goods or services) less the value of inputs used in producing these goods or services. The data source for Table 3.2 is the Annual Business Survey (ABS).

Table 3.2 Business number, employment and GVA by industry sector in Fife in 2013

	% Units	% Employment	% GVA
Fife total	100	100	100
Primary Industries	1.7	2.3	10.1
Manufacturing	6.6	16.3	30.3
Construction	11.1	7.7	8.6
Wholesale, retail and repairs	24.1	23.7	17.7
Transport and storage	3.3	3.7	4.2
Accommodation and food service activities	9.0	9.9	4.4
Information and communication	3.1	4.8	0.7
Real estate activities	2.6	1.1	1.3
Professional, Scientific and Technical Activities	16.3	6.4	8.3
Administrative and support service activities	6.2	5.1	4.1
Education, human health and social work activities	5.6	11.2	3.7
Arts, entertainment and recreation	3.5	4.4	5.8
Other service activities	7.0	3.3	0.8

Source: 2013 Annual Business Survey conducted by the Office for National Statistics. The industries covered by the ABS are: agriculture (support activities), forestry and fishing; production industries; construction industries; distribution industries; other service industries. The main industries excluded by the ABS are: agriculture (crop and animal production) financial activities; public administration and defence; activities of households as employers; undifferentiated goods and services-producing activities of households for own use; and activities of extraterritorial organisations and bodies. See: www.ons.gov.uk/ons/guide-method/.../abs-technical-report---june-2014.pdf
Note: Examples of the types of businesses in each category can be found at: www.gov.uk/government/uploads/system/uploads/attachment_data/file/455263/SIC_codes_V2.pdf

3.11. In terms of numbers of units, the most common enterprises were in Wholesale, retail and repairs, amounting to 24.1% of all enterprises in Fife. Next most common were those enterprises in the Professional, scientific and technical services, amounting to 16.3% of all enterprises in Fife. Considering employment, Wholesale, retailing and repairs employed the most, at 23.7% of all employees in Fife. Manufacturing was the next largest employer, accounting for 16.3% of employees in Fife.

3.12. For contribution to the economy (GVA), Manufacturing made by far the largest contribution at 30.3%. The next largest contribution came from Wholesale, retail and repairs at 17.7%.

Industry sector, occupation and economic status by age in Fife

3.13. Having established the contextual information in terms of Fife's population profile by age and the business profile, we now turn to consider the make-up of the labour market in Fife.

3.14. According to Scottish Household Survey figures for 2014, in Fife workers aged 50 plus were most likely to be working in the following sectors: Professional, scientific and technical; Construction; Arts, entertainment and recreation; and Financial and insurance activities (see Figure 3.5). By comparison, those aged between 16-50 years were most likely to be working in: Professional, scientific and technical; Arts, entertainment and recreation; Financial and insurance activities; and Education.

Figure 3.5 Employment by sector in Fife by age
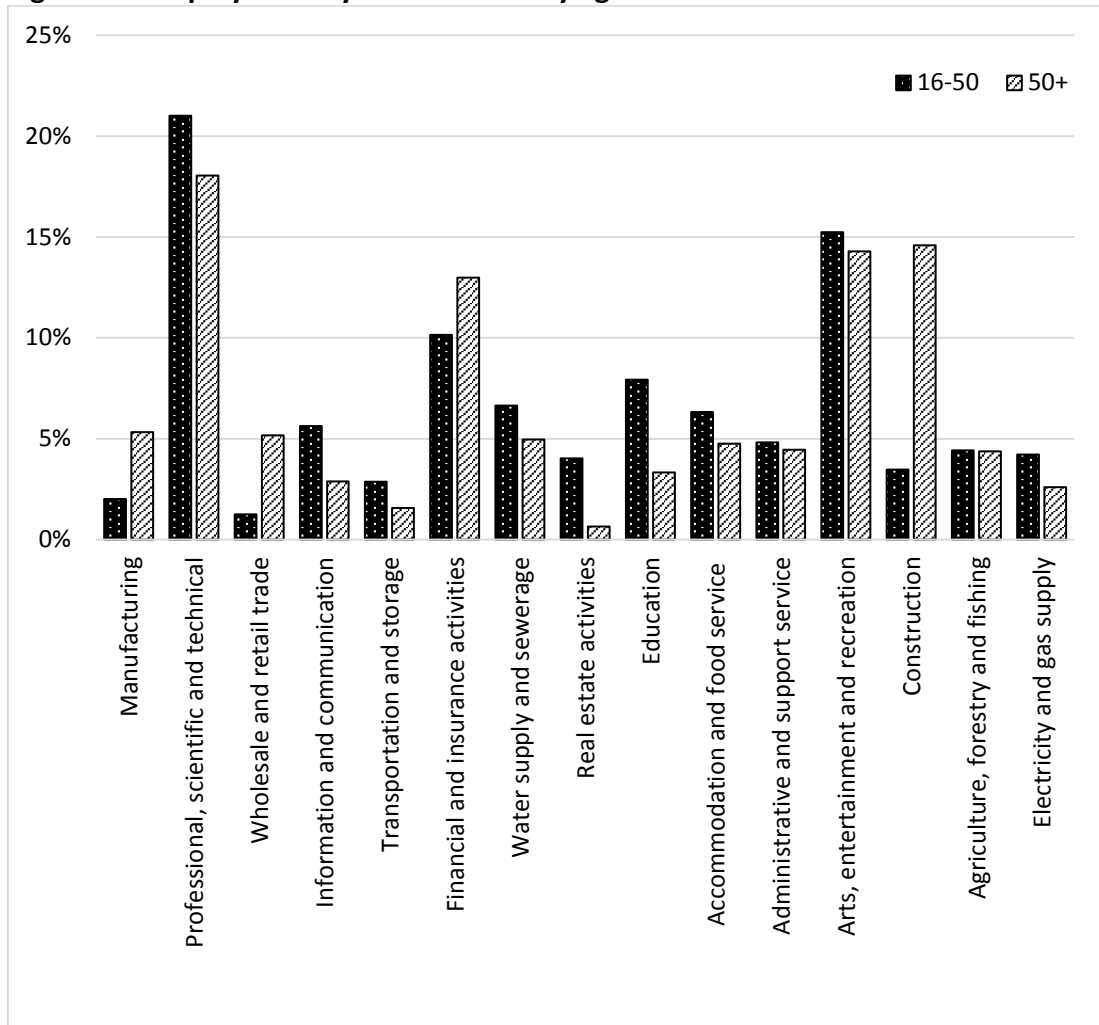
Source: Scottish Household Survey 2014
Note: The total sample size is 669 with 384 missing values.
Note: The Scottish Household Survey sample is chosen at random.

3.15.   There were marked gender differences in terms of the sectors those aged 50 plus were most likely to be working in (see Figure 3.6). Females aged 50 plus were most likely to work in the Professional, scientific and technical, Administrative and support services, and Electricity and gas supply sectors. Males aged 50 plus were most likely to work in the Manufacturing, Wholesale and retail trade, and Administrative and support services sectors.

Figure 3.6 Employment by sector for those aged 50 plus by gender in Fife
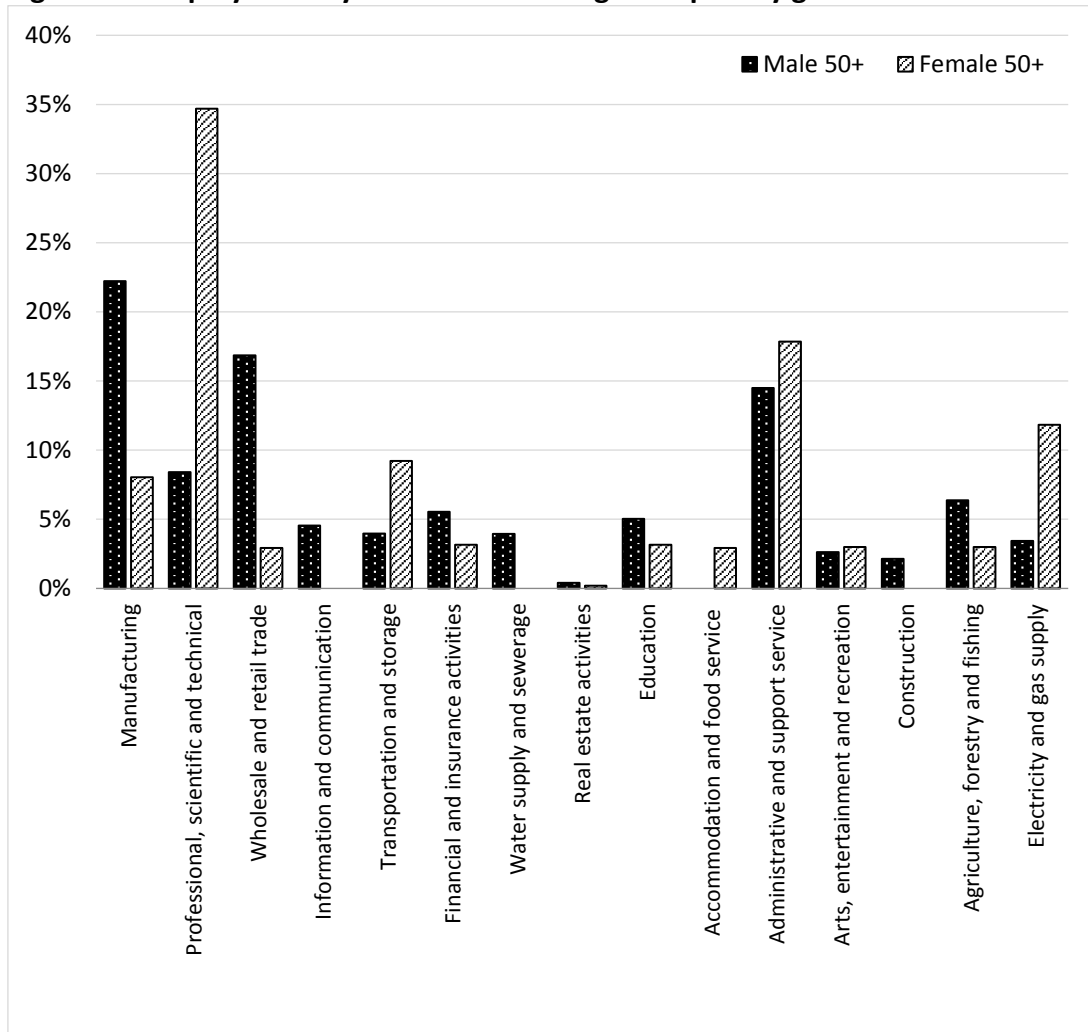
3.16.   In terms of Occupational Classification, as shown in Figure 3.7, the top four occupational categories for workers aged 50 or over were Professional; Associate professional; Skilled trades; and Managers and directors. For those aged 16-50 years the top four were the Skilled trades; Elementary; Process and plant operatives; and Associate professional.

Figure 3.7 Occupational classification by age in Fife

Source: Scottish Household Survey 2014
Note: The total sample size is 669 with 206 missing values.
Note: The Scottish Household Survey sample is chosen at random.

3.17.   In terms of formal qualification levels by age, Table 3.3 shows that the largest group among those aged 50 plus in Fife were those with no formal qualifications (32.6%), although 29.4% did have a Level 4 qualification. Those aged 16-50 had more formal qualifications, with only 14.6% having no formal qualifications at all.

Table 3.3 Formal qualification by age in Fife

|	16-50 years (%)	50+ (%)
Level 1 - 'O' Grade, Standard grade or equiv. (SVQ level 1 or 2).	25.7	8.9
Level 2 - Higher, A level or equivalent (SVQ Level 3)	15.7	13.3
Level 3 - HNC/HND or equivalent (SVQ Level 4)	19.4	10.4
Level 4 - Degree, Professional qualification (Above SVQ Level 4)	24.0	29.7
Other qualification	0.6	5.1
No qualifications	14.6	32.6

Source: Scottish Household Survey 2014
Note: The total sample size is 669 with 3 missing values.
Note: The Scottish Household Survey sample is chosen at random.

3.18.   The economic status of random adults in Fife by age is shown in Figure 3.8. More than 20% of those aged 51-64 were retired. However, there were still 42.9% of those aged 51-64 in paid full time employment, compared to 48.6% of those aged 16-50. In the Scottish Household Survey 2014 sample there were no individuals aged 50 plus who are recorded as being in education.

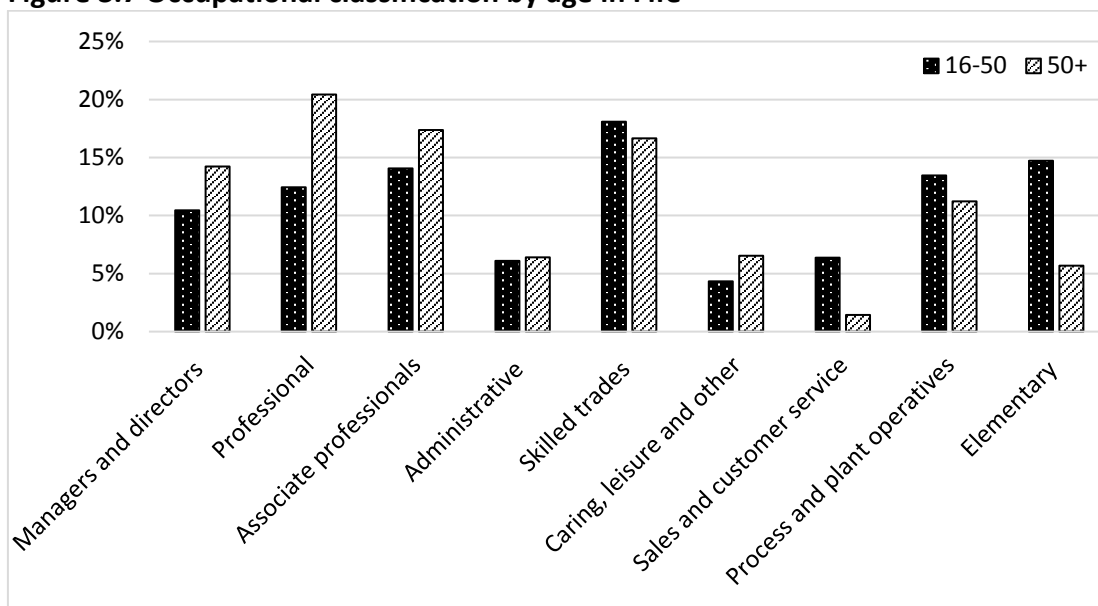**Figure 3.8 Economic status of random adults in Fife by age**
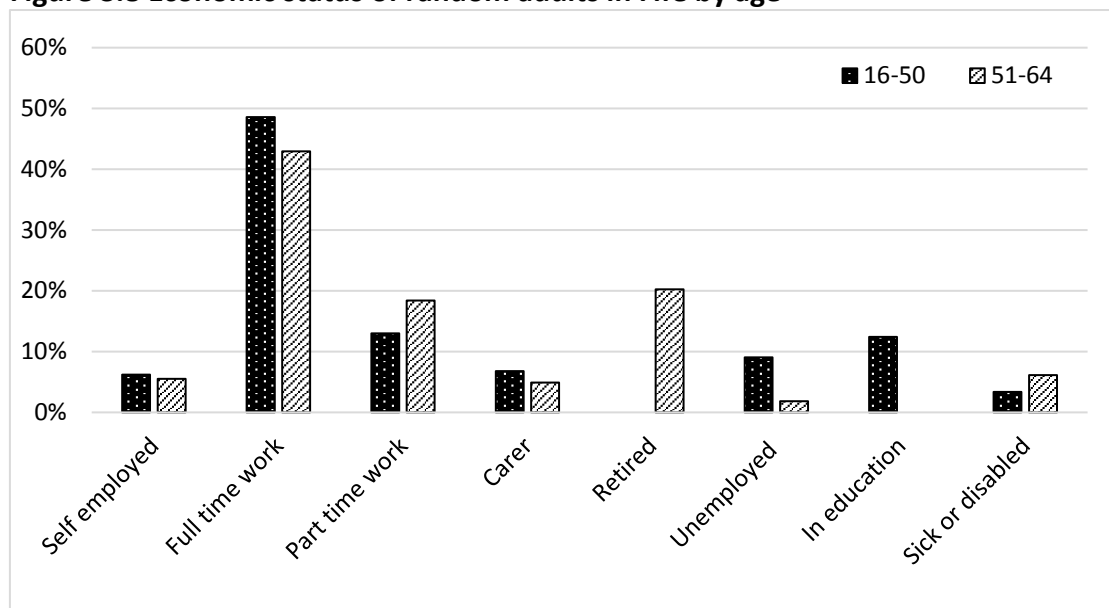
Source: Scottish Household Survey 2014
Note: The total sample size is 669 with 152 missing values.
Note: The Scottish Household Survey sample is chosen at random.

3.19.   The employment rate for different age groups in Fife was very similar to that for Scotland as a whole (see Figure 3.9). In Fife the employment rates for all ages, 50-64 year olds and those aged 65 plus was slightly lower than those in Scotland; while the rates for all other age groups in Fife were slightly higher than Scotland.

Figure 3.9 Employment rate by age for Fife and Scotland, 2015
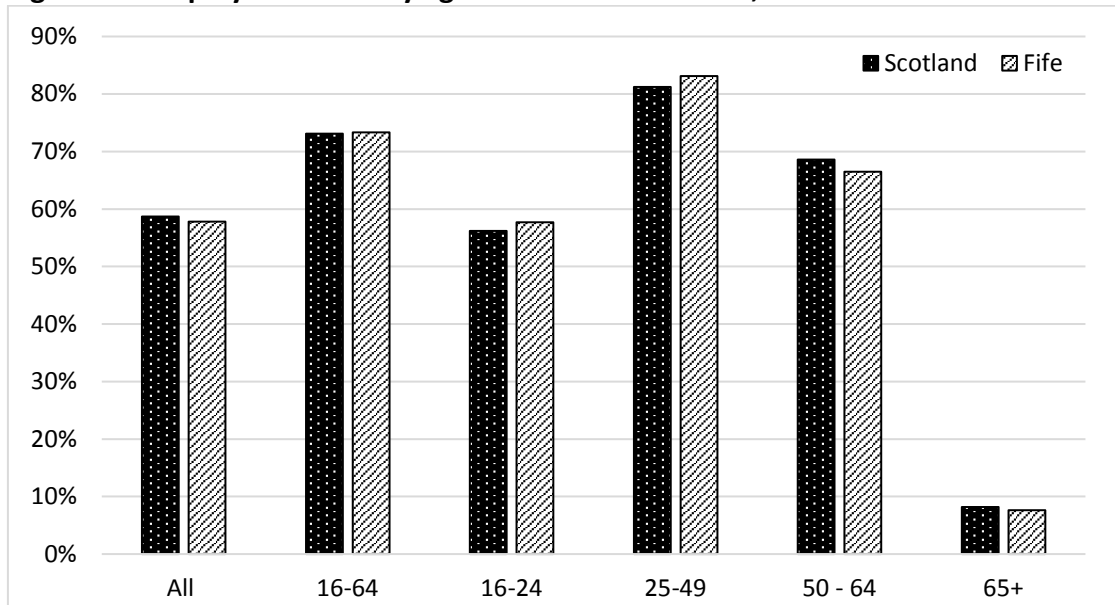
3.20. Economic inactivity (those not in paid employment and not seeking to be in paid employment) rates by age for Fife and Scotland as a whole are presented in Figure 3.10. As can be seen, although they were very similar to each other, the economic inactivity rates for all ages, 50-64 year olds and those aged 65 plus were slightly higher in Fife than in Scotland; while the rates for all the other age groups in Fife were slightly lower than Scotland.

Figure 3.10 Economic inactivity rates by age for Fife and Scotland, 2015
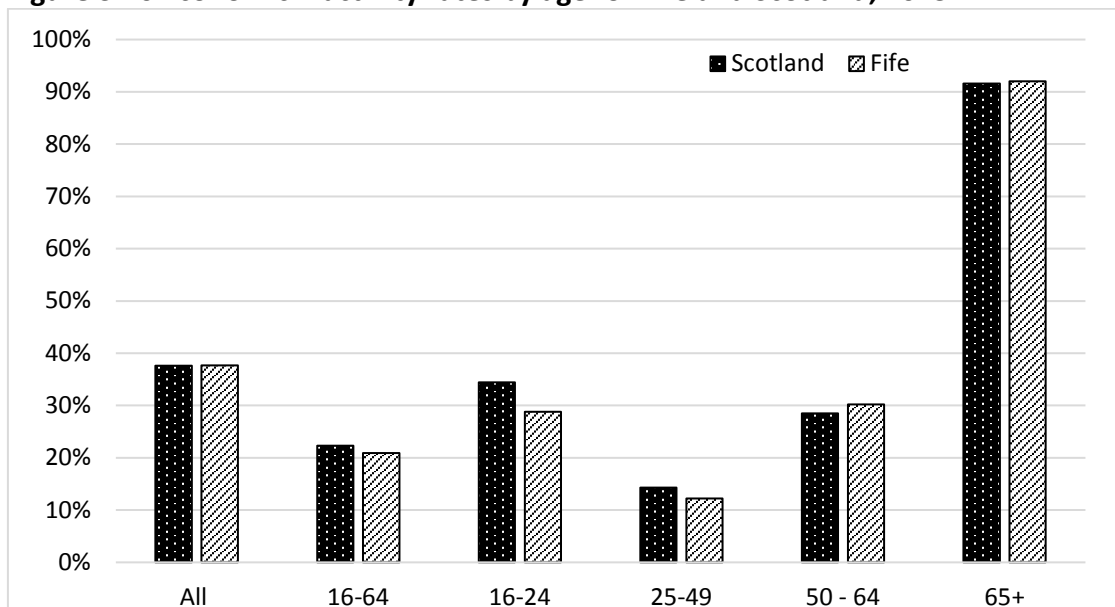
Summary

3.21.   Having considered a range of demographic data and population projections; and data on labour supply, employment by occupation, labour demand, employee jobs and business size and sector in Fife, the following key findings were identified:

- By 2037 both the 30-49 years and the 50-64 years' age groups are projected to decrease in size in Fife. This means that the core working age groups (as currently understood) will decrease in size.

- Looking at the current industry profile of Fife shows that Wholesale, retail and repairs, Manufacturing, Professional, scientific and technical activities, Construction, and Education, human health and social work activities were key sectors in Fife in terms of the number of units, employment and GVA.

- In Fife those aged 50 plus were most likely to be working in the following sectors: Professional, scientific and technical; Construction; Arts, entertainment and recreation; and Financial and insurance activities (although there were gender differences).

- In Fife more than 20% of those aged 51-64 were retired, although 42.9% of those aged 51-64 were working full time.

Chapter 4: Ageing workforce in Fife survey results

4.1. This chapter presents the results of the online survey of employers in Fife. There were 172 valid and usable responses for analysis in this chapter.

Overview of the participating workplaces

4.2. When asked to select from a list the main activities of the workplace, the top three activities were: 'Human health and social work activities' (14.5%), 'Manufacturing' (13.8%) and 'Education and training' (13.8%) (see Figure 4.1).

Figure 4.1 The main activities of the participating workplaces
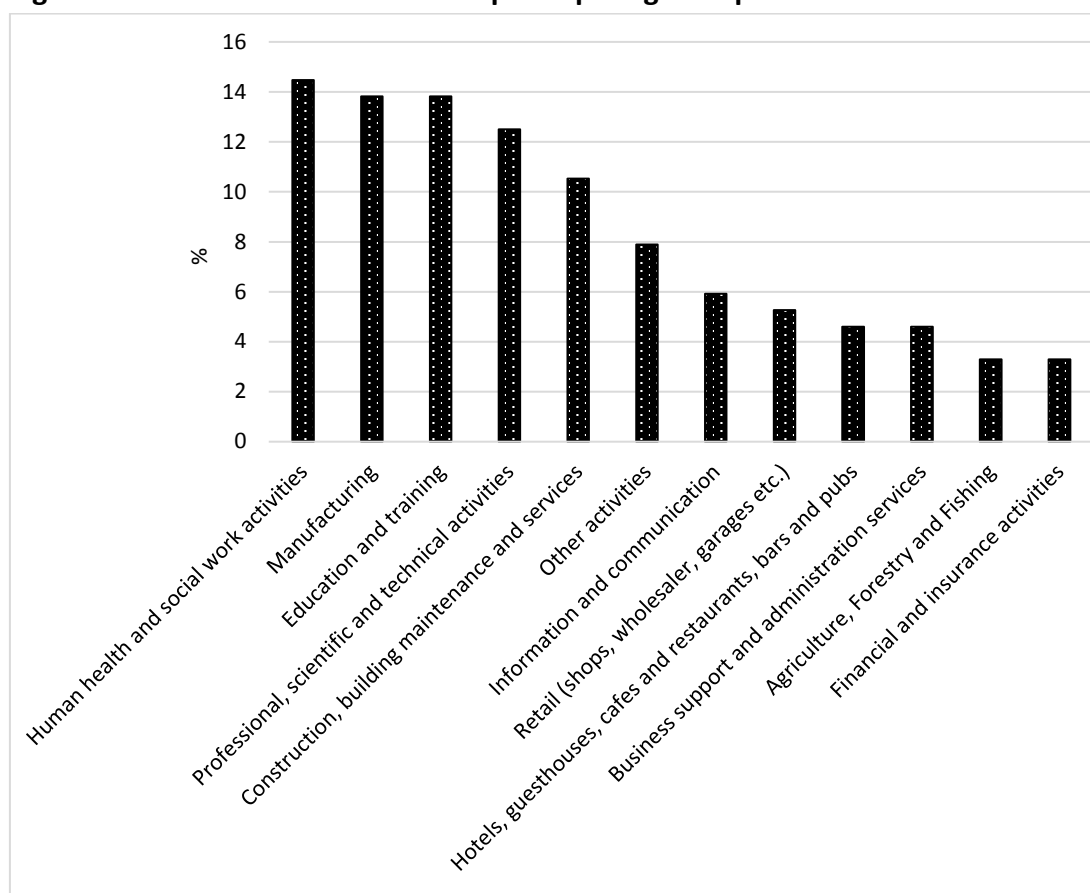
Note: 132 responses

Note: 'Other activities' group together the following: Energy or power generation and supply; Water supply, sewerage, waste management; Transportation and storage; Childcare, public administration and defence, and compulsory social security; Real estate activities; and Hairdressing and other beauty treatment. This is because none of these got more than 3 responses.

4.3. In terms of sector, 68.8% of workplaces were from the private sector; 24.0% from the third sector and social enterprises; and 7.1% from the public sector. In terms of type of establishment, 83.6% were single independent entities and only 16.4% were part of a larger workplace.

4.4.   As can be seen from Figure 4.2, the responding workplaces primarily came from SMEs (workplaces employing 50 individuals or less). Over 40% (43.7%) had 10 or less employees; 21.9% had between 11 and 20 employees; 17.2% had between 21 and 50 employees; and less than 10% had between 51 and 100 or more than 100 employees.

Figure 4.2 Participating workplaces by number of employees
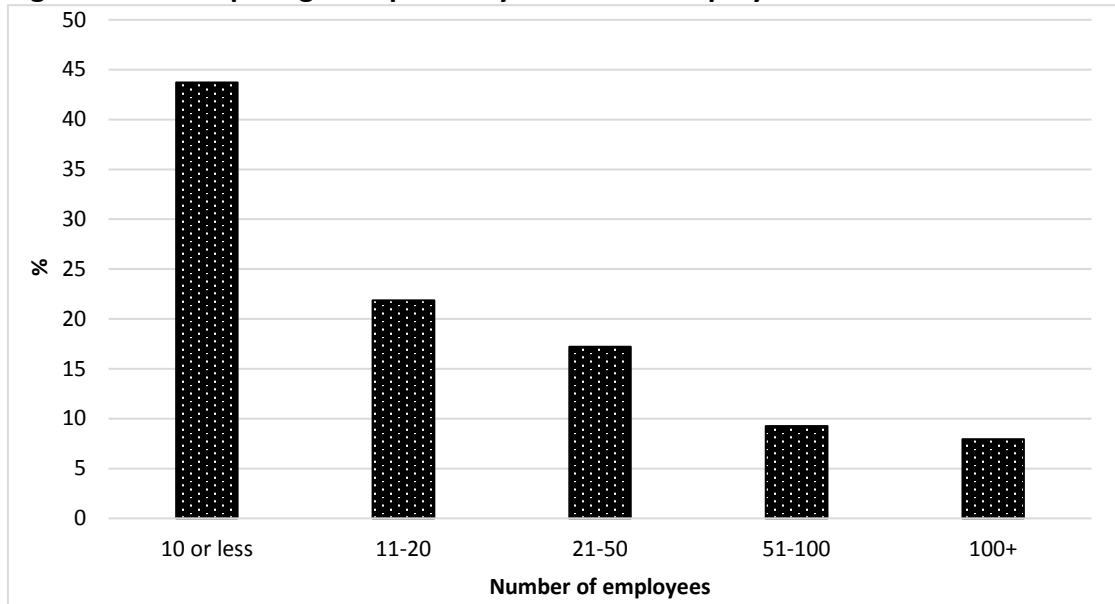
Note: 151 responses

4.5.   61.0% of workplaces had more than 20% of their workforce aged 50 plus. 12.8% of workplaces had more than 20% of their workforce aged 65 plus (Figure 4.3).

Figure 4.3 Age structure of employees in the workplace
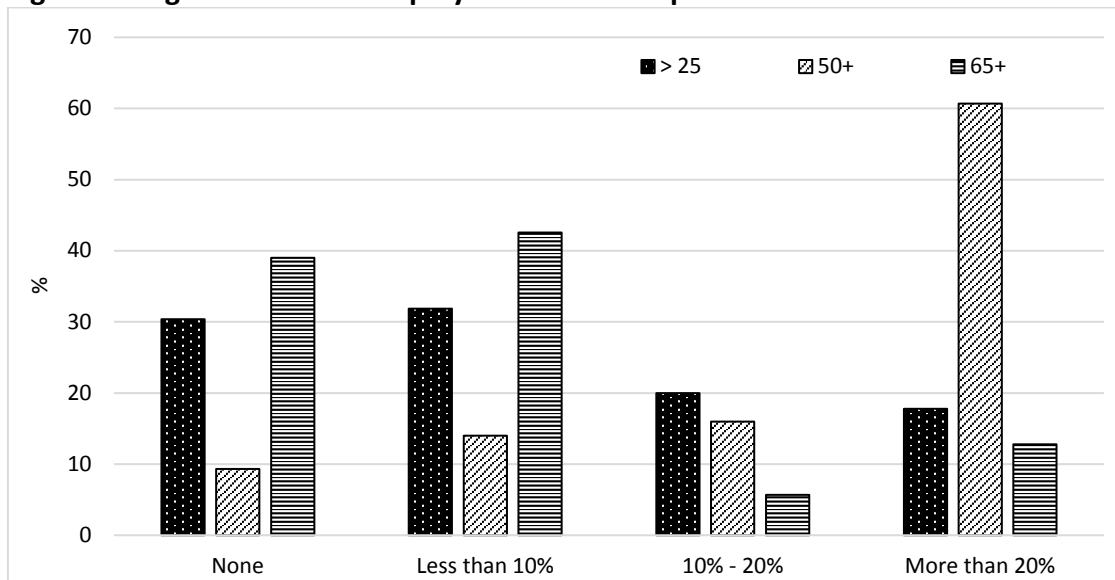
Note: 135 responses for "Aged under 25", 150 responses for "Aged over 50" and 141 responses for "Aged over 65".

4.6.   Figure 4.4. shows respondents' opinions regarding what age they would consider someone to be an 'older worker' in their workplace (after this question, respondents were asked when answering the remaining questions in the survey to consider over 50 as older). For 9.5% there was felt to be no specific age. However, 2.0% regarded those aged between 30-40 years as older workers; 12.2% regarded those aged between 41-50 years as older workers; 41.9% regarded those aged between 51-60 years as older workers; and 34.5% regarded those aged 60+ as older workers.

Figure 4.4 At what age is someone considered to be an 'older worker' in your workplace
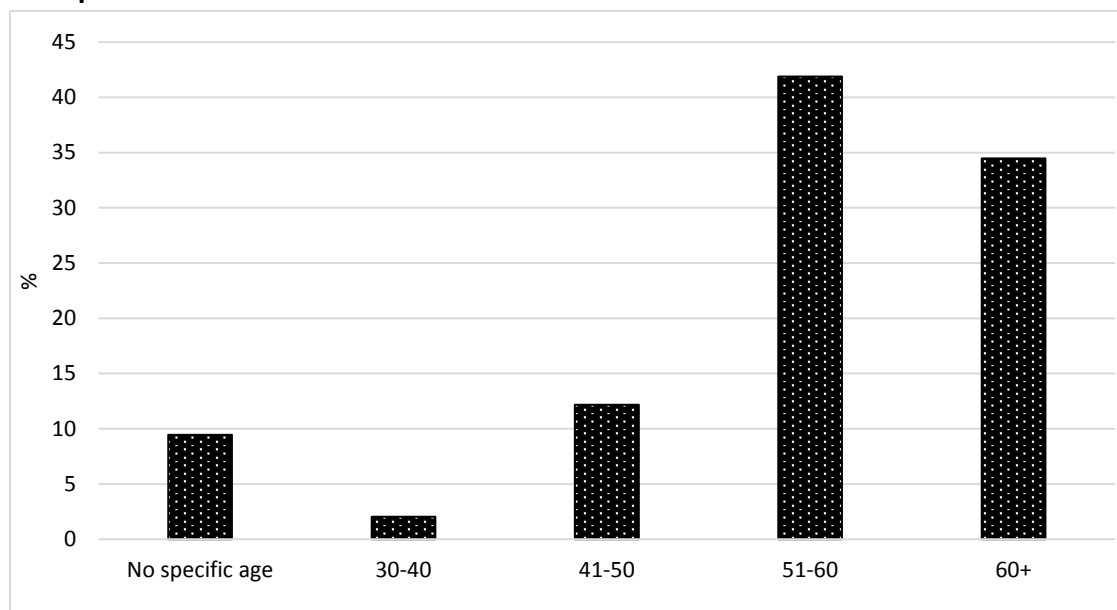
Note: 148 responses

4.7.   Respondents were asked whether there was a normal retirement age in their workplace (see Figure 4.5). Of those who responded to the question, 63.2% said there is no specific retirement age, and the low response rate to this question (only 87 responses) may be indicative of uncertainty. Of respondents who said there was a normal retirement age, 68.7% said that this was 65 years old.

Figure 4.5 The normal retirement age of workers in the workplace
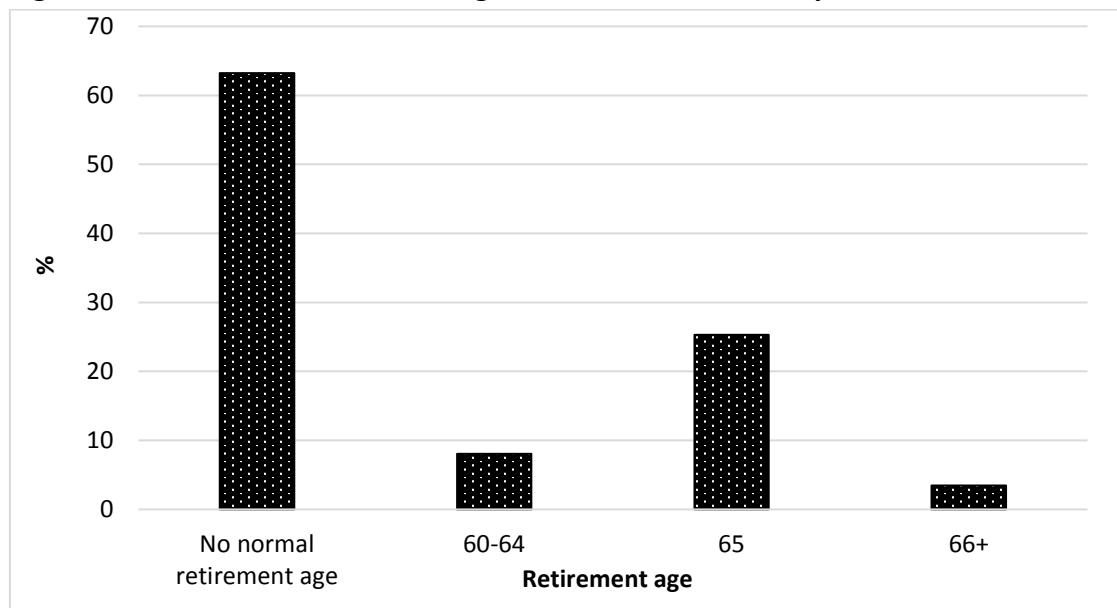
Note: 89 responses

The effects of the ageing population

4.8.   Responses to a number of statements on the effects of an ageing workforce are displayed in Table 4.1. By combining the strongly agree and agree categories, and doing the same for the strongly disagree and disagree categories, it can be observed that 61.8% of the respondents agreed that the staff profile of their workplace is getting older while only 13.2% disagreed. Nearly half (49.6%) of the respondents agreed that their workplace is aware of an increased need to support older workers, while only 14.2% disagreed. Just over 40% (40.6%) of the respondents agreed that population ageing will present challenges for their workplace and 32.9% disagreed.

4.9.   However, the respondents tended to disagree rather than agree that population ageing is affecting the customer profile (42.4% disagreed vs 23.6% agreed); that there are established policies to address the effects of an ageing workforce (37.1% disagreed vs 28.7% agreed); or that their workplace is currently reviewing and developing policies to address the effects of ageing workforce (36.2% disagreed vs 24.1% agreed). Collectively this suggests that workplaces are aware that population ageing affects their workplace but the issue has not as yet been effectively addressed.

Table 4.1 Effects of an ageing workforce in the workplace

	Strongly agree (%)	Agree (%)	Neither agree nor disagree (%)	Disagree (%)	Strongly disagree (%)	Total (N)
The staff profile of this workplace is getting older	23.6	38.2	25.0	12.5	0.7	144
This workplace is aware of an increased need to support older workers	13.5	36.2	36.2	12.8	1.4	141
Population ageing is affecting the customer profile of this workplace	8.3	15.3	34.0	36.8	5.6	144
Population ageing will present challenges for this workplace	11.9	28.7	26.6	28.0	4.9	143
There are established policies in this workplace to address the effects of an ageing workforce	8.4	20.3	34.3	30.8	6.3	143
We are currently reviewing and developing policies in this workplace to address the effects of an ageing workforce	3.5	20.6	39.7	28.4	7.8	141

Policies and practices

4.10.   Respondents were presented with a list of factors that might be considered when recruiting employees in the workplace, and asked to indicate how important these were (Table 4.2). The results indicate clearly that the most important factors are: 'Fit with the advertised job/role/task' (95.7%), 'Candidate's motivation' (94.9%), 'Experience' (89.1%) and 'Previous employment history' (89.1%) (with responses for 'important' and 'very important' combined).

4.11.   Around half of the respondents regarded factors such as 'How long you think they will stay with the workplace' (55.1%), 'Health and disability (physical/mental)' (53.6%) and 'Recommended by another employee' (49.3%) as either very important or important.

On the other hand, most considered 'Age' (55.5%) and 'Closeness to retirement' (49.6%) either 'not important' or 'not important at all'.

Table 4.2 Important factors considered when recruiting employees

	Very important (%)	Important (%)	Neutral (%)	Not important (%)	Not at all important (%)	Total (N)
Recommended by another employee	16.2	33.1	29.4	11.8	9.6	136
Age	0.0	5.1	39.4	35.8	19.7	137
Closeness to retirement	1.5	8.8	40.1	29.9	19.7	137
Experience	57.2	31.9	6.5	2.2	2.2	138
Previous employment history	42.0	47.1	5.8	2.9	2.2	138
Fit with the advertised job/role/task	49.6	46.0	2.2	0.7	1.4	139
How long you think they will stay with the workplace	12.3	42.8	27.5	10.9	6.5	138
Candidate's motivation	60.9	34.1	2.2	1.4	1.4	138
Health and disability (physical/mental)	13.8	39.9	29.7	9.4	7.2	138

4.12. Respondents were presented with a list of possible advantages of having older workers in the workplace[8], and the percentage of respondents who indicated that they concurred with each of these is displayed in Figure 4.6 (this was calculated as number who selected a particular advantage listed divided by total valid online survey responses (172)). The top three advantages for having the older workers in the workplace were: their experience, reliability, and skills and knowledge, which accounted for 72.7%, 66.3% and 64.5% respectively. Fewer respondents felt that advantages to having older workers in the workplaces included: being quick to absorb

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[8] Respondents were asked to select all statements that applied and to answer even if you did not currently employ any older workers.

new knowledge, being more flexible than younger workers, and willingness to learn new tasks, which accounted for 13.4%, 24.4% and 27.9% of responses respectively.

Figure 4.6 Advantages of having older workers in the workplace
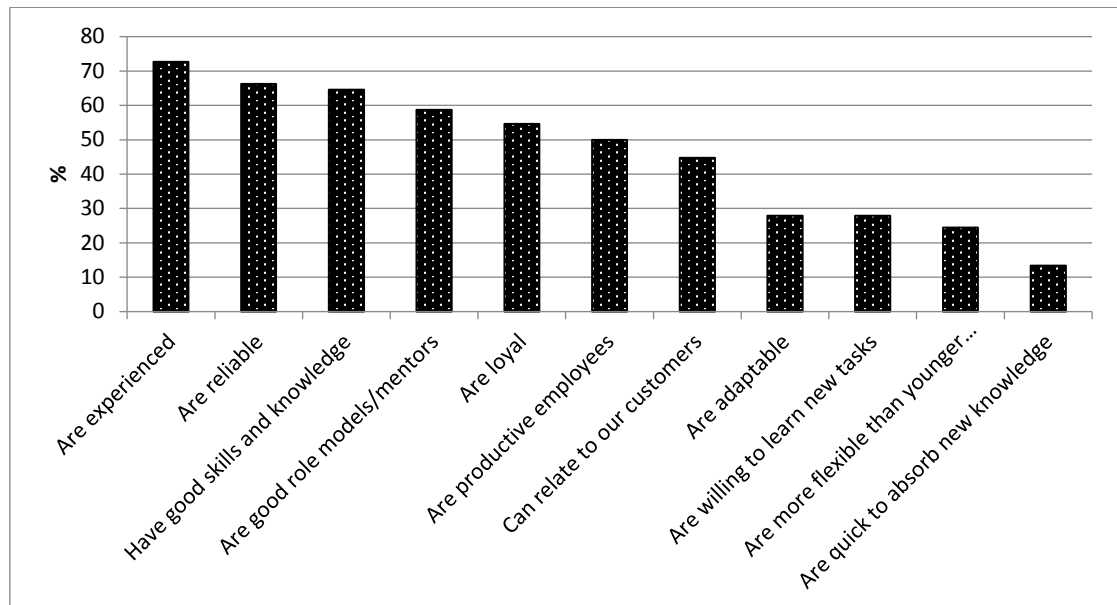
4.13. Respondents were also presented with some possible challenges of having older workers in the workplace[9], and the percentage of respondents who concurred with each of these is shown in Figure 4.7. In general, respondents were less likely to perceive challenges. The most challenging aspect was that older workers were felt not to be able to easily adapt to new technology (40.1%); followed by disliking taking instructions from younger workers (20.9%) and that they are hard to train (12.2%). Aspects least likely to be considered a challenge were older workers being unable to relate to the customers (0.6%), being disruptive in team meetings (1.2%) and finding it hard to integrate into the workplace (2.9%).

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[9] Respondents could select all statements that applied and to answer even if they did not currently employ any older workers.

Figure 4.7 Challenges of having older workers in the workplace
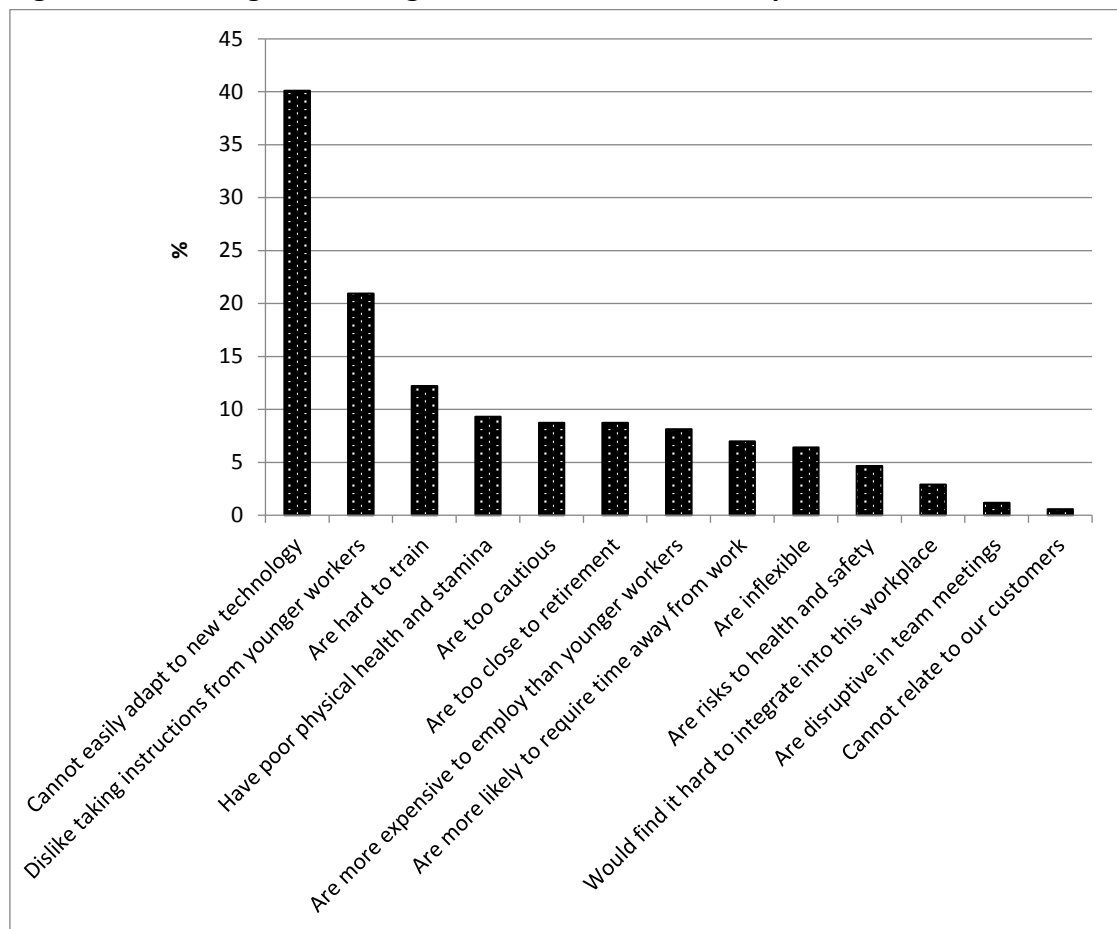
4.14. Figure 4.8 shows the proportion of respondents offering different types of working arrangements, and the availability of these arrangements to older workers. The top three most common arrangements were part-time working (operated in 61.6% workplaces, and available to older workers in 52.3% of workplaces), special leave (operated in 56.4% workplaces, and available to older workers in 46.5% of workplaces) and the ability to change set working hours or to reduce working hours (operated in 42.4% workplaces, and available to older workers in 40.7% of workplaces). The disparities between the different types of working arrangements offered and the availability of these arrangements to older workers needs to be unpicked further by future research.

Figure 4.8 Working arrangements and their availability to older workers
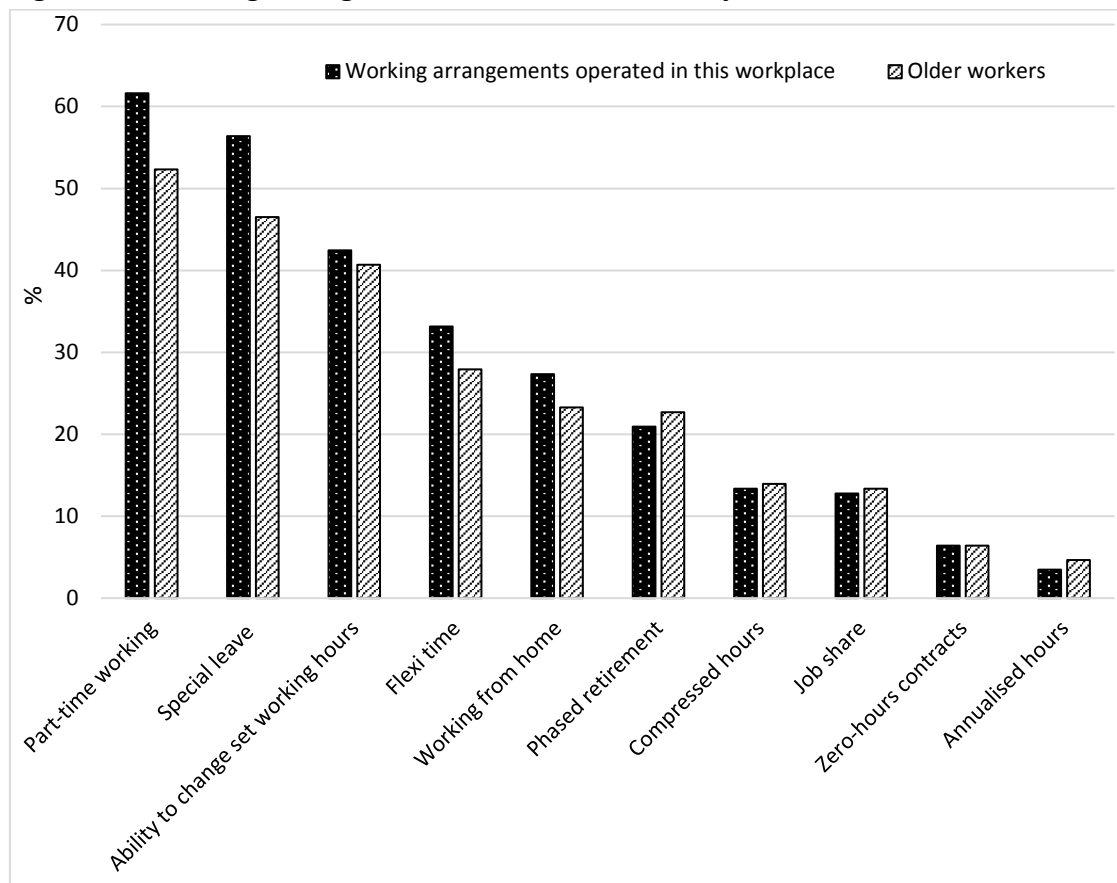
4.15. Respondents were asked about the practices used to ensure workers develop and keep their skills up to date to meet business needs, and their applicableness to older workers. Responses to this question are shown in Figure 4.9. The most popular practice is regular reviews of the training needs of all employees (59.3%, which in 46.5% of workplaces was applied to older workers). This is followed by 'requirement for line managers to encourage employees to take part in training', 'encouraging employees to act as mentors and mentees', 'catering for trainees' individual learning styles'. These practices are slightly less likely to be applied to older workers across all categories, but the gap was 10% or less in all cases.

Figure 4.9 Practices to ensure workers develop and keep their skills up to date
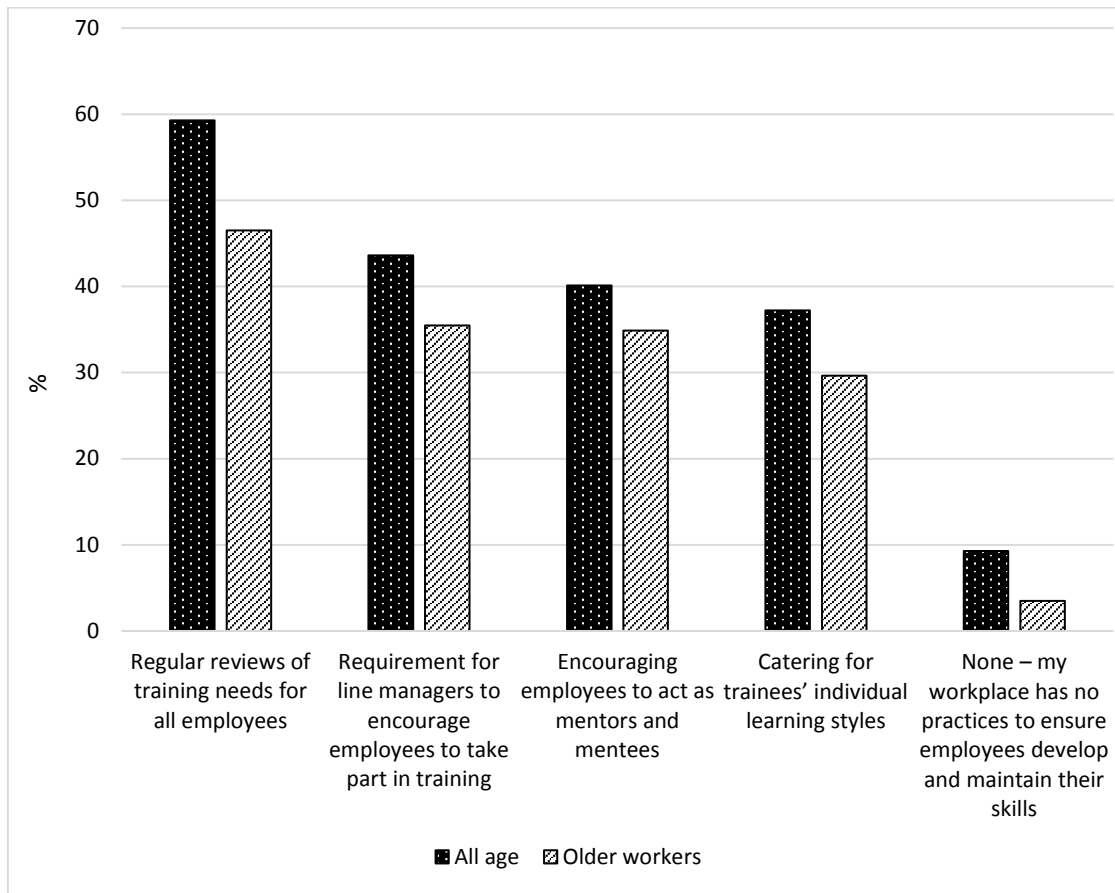
4.16. Respondents were asked whether selected age related factors affect whether employees are able take part in training, but these were found to be unimportant (Table 4.3). Only the potential length of service (i.e. how long an employee will stay) was considered in more than 10% (12.2%) of the participating workplaces. Time left before retirement was relevant in just 7.5% of workplaces, and age in only 5.0% of workplaces.

Table 4.3 Factors which affect who gets to take part in training

	Yes (%)	Total (N)
Age	5.0	121
Potential length of service	12.2	123
Time left before retirement	7.5	120

4.17. Table 4.4 shows the retirement arrangements respondents reported in their workplace (selected from a list). By far the most common arrangement was a pension scheme to which the workplace contributes, which was applied in 72.9% of the workplaces. Whereas fewer than 1 in 5 workplaces had a formal policy on retirement, or provided retirement planning services for older staff members (14.5% and 18.1% respectively).

Table 4.4 Retirement arrangements in the workplace

	Yes (%)	Total (N)
Has a formal policy on retirement	14.5	131
Provides retirement planning services for older staff members	18.1	127
Has a pension scheme to which the workplace contributes	72.9	129

4.18. Respondents were asked which factors they considered when selecting an individual for redundancy (Figure 4.10). The top three most important factors identified were: 'Role within the workplace' (58.1%), 'Job performance/efficiency' (45.9%) and 'Absence/disciplinary record' (42.4%). In contrast, less than 5% of workplaces consider age of the employee (both older workers and younger workers) or junior members of staff (1.7%). Only 1.7% stated that redundancy is voluntary.

Figure 4.10 Factors considered when selecting an individual for redundancy
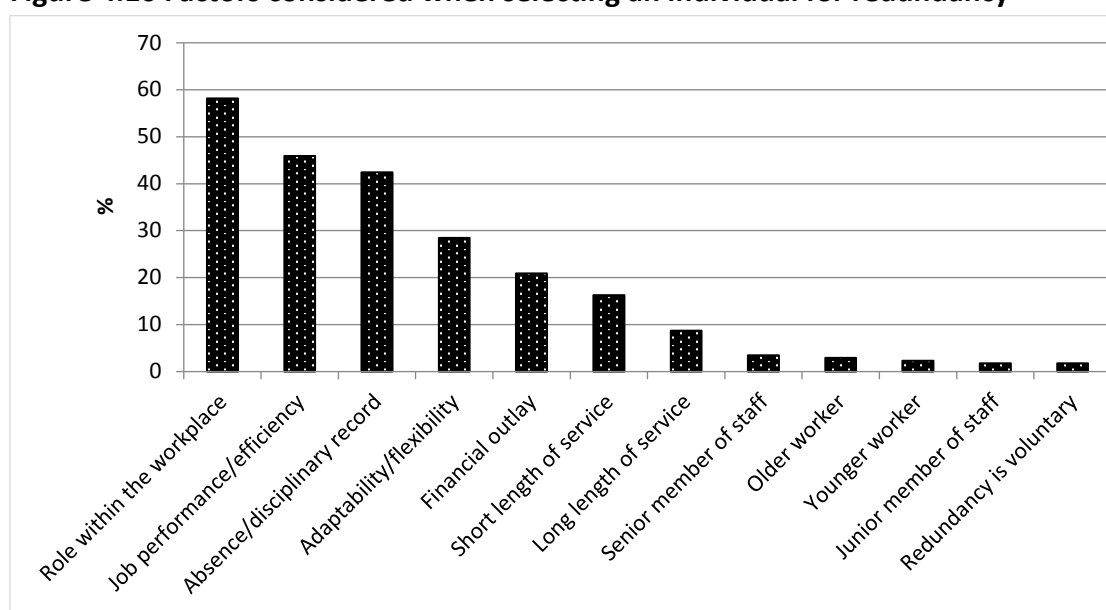
Health, safety and wellbeing

4.19. Only 23.3% of workplaces had made consideration of how suitable their workplace is for older workers.

4.20. There were 25 useable answers to the open question which asked respondents to provide comment if consideration had been made to how suitable their workplace is for older workers (e.g. whether this consideration had led to any re-design/adjustment of policies or practices (current or planned) to make their

workplace more suitable for older workers). Of these, eight referred to reviewing workplace policy and practices, six mentioned physical adjustments, three said that areas of the workplace were made more accessible, two mentioned task reallocation, three stated training was given, and two mentioned flexible hours.

4.21.   A respondent from the construction sector stated that:

> *"The health and safety of our employees is paramount. Reasonable adjustments, where required are put in place for any employee. This may be in the form of extended deadlines for* [work] *to be completed for an older worker, assess each sites suitability i.e. requirement for scaffolding, working hours, number of employees required"*

4.22.   One respondent from the manufacturing sector stated that they conducted *"ageing workforce risk assessments"* where factors such as eyesight and hearing were considered.

4.23.   In terms of physical changes made, responses were mainly that no changes were made. But where changes were made they included fitting stair lifts, ensuring easy access to all works areas and fitting large screens to workstations. Policy changes were also made which included relocation of duties and introducing flexible hours. Also an increased focus on ergonomics was mentioned.

4.24.   The sources of information sought during the last 12 months on the health, safety and wellbeing of employees is displayed in Figure 4.11. The main three information sources were: specialist HR consultant (13.4%), specialist consultant (12.8%) and occupational health (12.8%). The information sources rarely used were Working Health Services (2.3%), other internal advisers (2.3%), and the Scottish Centre for Healthy Working Lives (1.7%). Healthy Working Lives Fife services, accessed through Workplace Team, Health Promotion were more often approached (6.9%).

Figure 4.11 Sources of information sought on the health, safety and wellbeing of the employees in the last 12 months
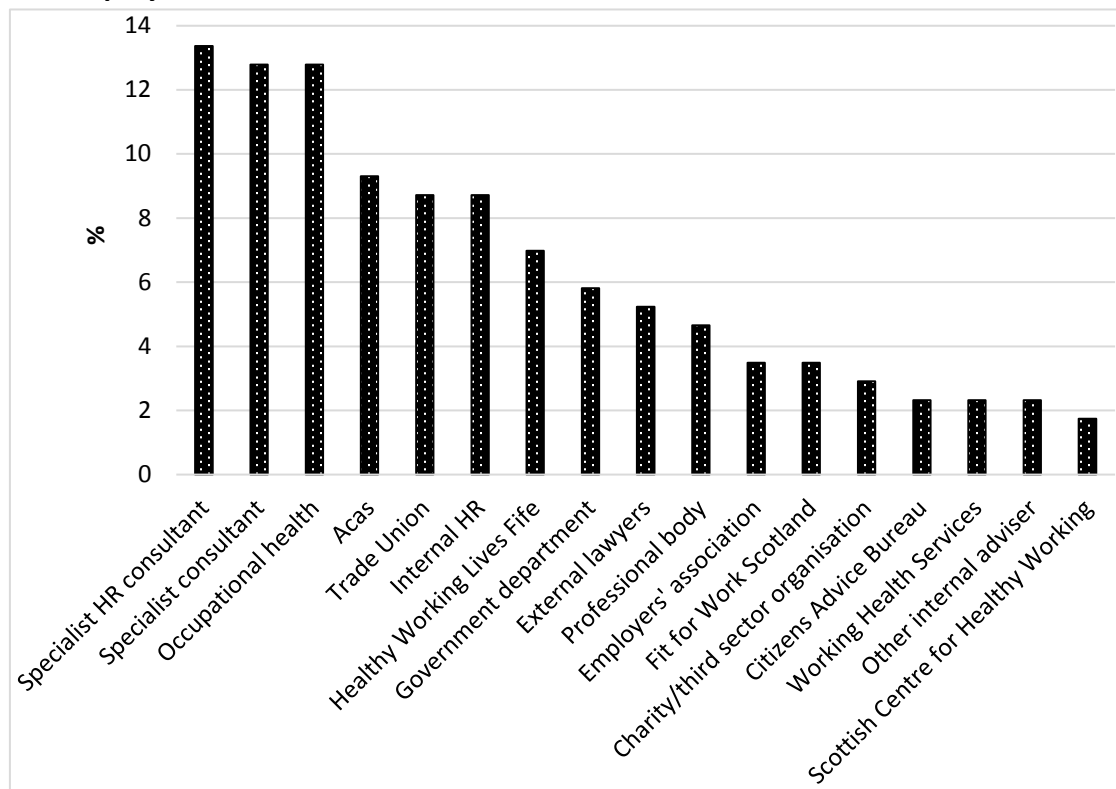
4.25. Table 4.5 shows respondents' perceptions about the ability of older workers to perform specific working activities. As can be seen, older workers were reported to be able to perform well with almost all the listed activities (combining the strongly agree and agree categories, all percentages are over 40%). Older workers were perceived as most able to perform jobs involving customer interaction (83.5%), driving (75.4%) and wearing personal protective equipment (72.1%). There was some disagreement that older workers can perform jobs involving working at height (16.8%), lifting (16.0%), and working in harsh physical environments (13.2%) (with disagree and strongly disagree categories combined).

Table 4.5 Older workers' ability to perform jobs that involve specific work activities

	Strongly agree (%)	Agree (%)	Neither agree nor disagree (%)	Disagree (%)	Strongly disagree (%)	Total (N)
Operating machinery	22.8	48.8	28.5	0.0	0.0	123
Working in harsh physical environments	8.3	34.7	43.8	10.7	2.5	121
Driving	18.0	57.4	22.1	2.5	0.0	122
Good vision	11.7	46.7	35.8	5.8	0.0	120
Good hearing	11.0	42.4	40.7	5.9	0.0	118
Working at height	10.1	34.5	38.7	16.8	0.0	119
Lifting	9.2	33.6	41.2	16.0	0.0	119
Working with computers	18.2	48.8	26.4	5.8	0.8	121
Delivery/courier work	14.5	40.2	43.6	0.9	0.9	117
Wearing personal protective equipment	27.0	45.1	27.0	0.8	0.0	122
Customer interaction	30.6	52.9	16.5	0.0	0.0	121
Working outdoors	20.0	45.0	33.3	1.7	0.0	120
Shift work	14.5	40.2	42.7	2.6	0.0	117
Working in a fast-paced environment	10.8	29.2	50.8	9.2	0.0	120
Memory skills	11.6	43.8	38.8	5.0	0.8	121
Working in a busy and noisy environment	13.2	42.1	39.7	5.0	0.0	121

4.26. Figure 4.12 shows the extent to which respondents concurred that particular changes would be required in their workplaces if the number of older workers increased substantially. These changes were generally not felt to be necessary, with no change felt to be required by more than 30% of respondents. The top three changes were: to discuss, review and/or change fitness for work assessment (25.6%), physical adjustment to the working environment (23.3%) and flexible working (22.7%). On the other hand, the bottom three changes were: to discuss, review and/or change contracts (8.7%), absence management policies/procedures (12.2%) and performance management policies/procedures (12.8%).

Figure 4.12 Changes required in this workplace if the number of older workers increased substantially
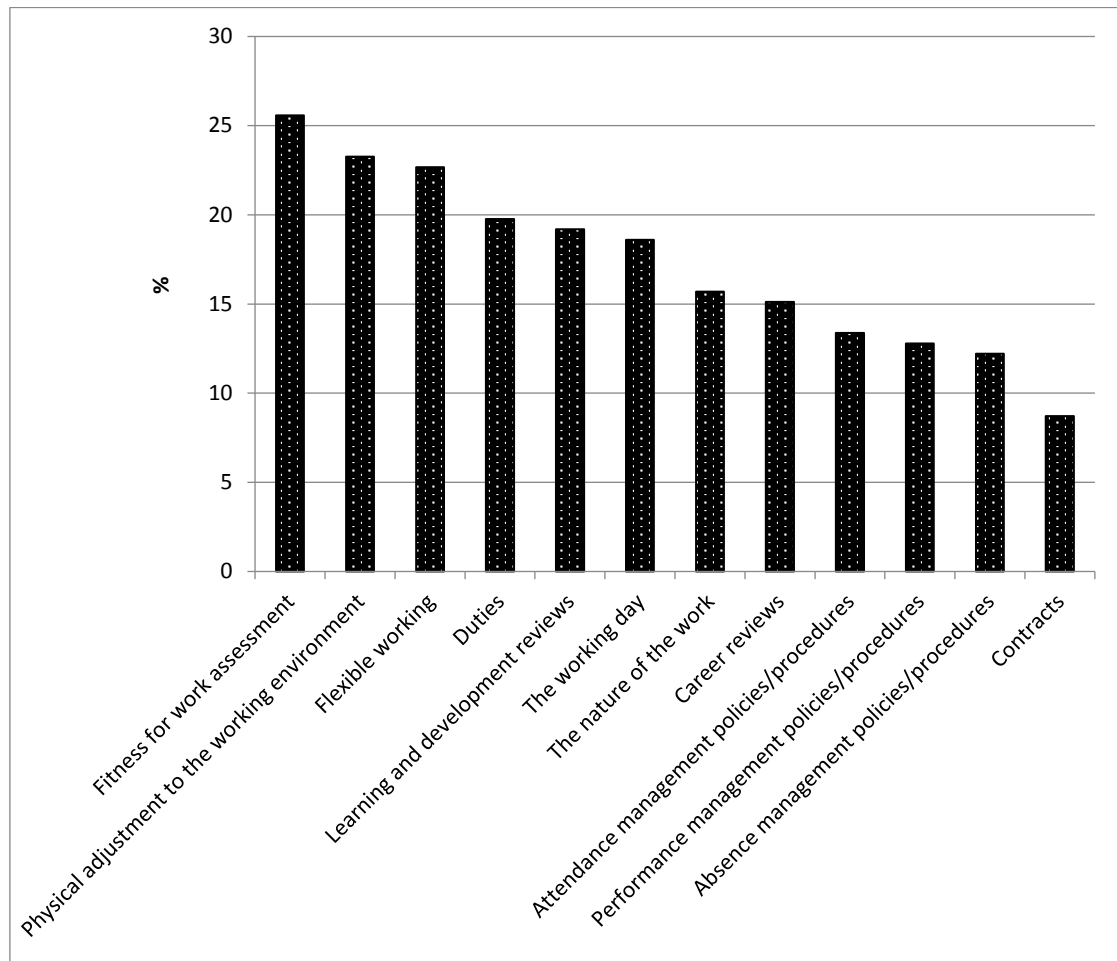
Supporting employers in Fife

4.27.   There were 122 responses to the questions of whether the respondent's workplace would welcome information, support or advice on the ageing workforce and older workers. Just over a quarter (25.4%) answered 'yes'; 36.9% answered 'yes, but in the future'; and 37.7% answered 'no'.

4.28.   The types of information, support or advice cited as being useful in improving knowledge, understanding and management of an ageing workforce and older workers are displayed in Figure 4.13. It can be seen that 'Free information, support or advice' (22.1%), 'Provision of information and resources' (19.8%) and 'Web information' (19.2%) were identified as most useful. The respondents also mentioned in their responses that *"a one stop shop not dozens of different agencies"* and *"advice on pensions"* would also be useful.

Figure 4.13. Useful information, support or advice for the workplace to improve knowledge, understanding and management of an ageing workforce and older workers
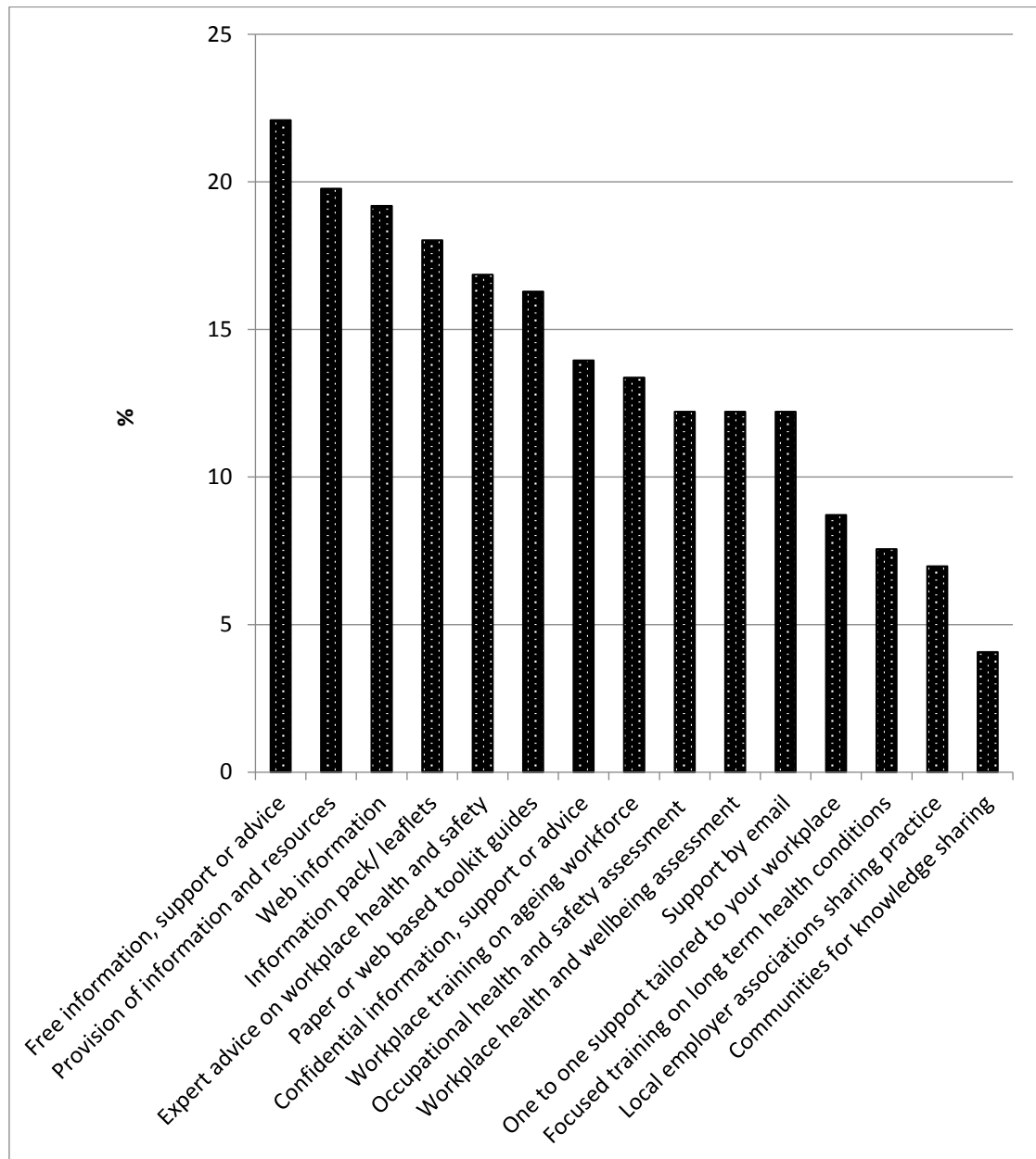
4.29. In answer to the open question of 'Are there any topics you feel that this workplace needs support with to proactively prepare for managing and ageing workforce?', the respondents requested financial help for the self-employed and help with succession training. Nineteen of the 25 who replied to this question did not express any need.

4.30. One respondent stated:

> *"As I am like so many companies that are a one person working doing everything. I feel that I will always have to self-fund projects to work and that the burden on people like myself is enormous already. The likelihood that I will take staff on that are older is*

highly unlikely unless they are self-employed and can prove this with no burden to my business"

Differences between workplaces by sector, ownership, industry type and number of employees

4.31.   Table 4.6 presents the mean level of agreement with statements related to business awareness of population ageing, broken down by sector, type of industry (service industry vs non-service industry[10]) and workplace, and size of workplace.

4.32.   There are no significant differences between the private sector and other sectors in mean levels of agreement, except that those in the private sector are significantly less in agreement that the workforce is ageing.[11]

4.33.   Ownership (single independent entity vs. part of a larger organisation) does not seem to make a significant difference to the mean responses to these awareness questions. It is a similar case for workplace size in terms of number of employees, except that larger workplaces are more likely to agree that the ageing workforce will present a challenge.

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[10] Service industry: Retail (shops, wholesaler, garages etc.); Hotels, guesthouses, cafes and restaurants, bars and pubs; Information and communication; Financial and insurance activities; Professional, scientific and technical activities; Business support and administration services; Education and training; Human health and social work activities; Childcare, public administration and defence, and compulsory social security; Transportation and storage; Real estate activities; Hairdressing and other beauty treatment
Non-service industry: Agriculture, Forestry and Fishing; Manufacturing; Construction, building maintenance and services; Energy or power generation and supply; Water supply, sewerage, waste management.
[11] For testing the difference between the means, either independent sample t-tests (if only two categories) or one-way analysis of variance (ANOVA) (more than two categories) was used; with the significance threshold of 0.05 level.

Table 4.6 Means relating to business awareness of the ageing population

Business awareness of the ageing population	Industry type		Sector		Workplace type		Number of employees		
	Non-service	Service	Private sector	Other sectors	Single independent	Part of a larger one	0-10	11-50	51+
The staff profile of this workplace is getting older	2.26	2.31	2.41	2.02	2.26	2.38	2.33	2.27	2.14
This workplace is aware of an increased need to support older workers	2.33	2.58	2.47	2.64	2.56	2.42	2.54	2.58	2.23
Population ageing is affecting the customer profile of this workplace	3.38	3.09	3.27	2.93	3.19	2.96	3.17	3.20	3.05
Population ageing will present challenges for this workplace	2.71	2.89	2.96	2.62	2.89	2.67	3.07	2.85	2.32
There are established policies in this workplace to address the effects of an ageing workforce	3.05	3.08	3.00	3.20	3.12	2.79	3.10	3.03	2.91
We are currently reviewing and developing policies in this workplace to address the effects of an ageing workforce	3.07	3.18	3.08	3.34	3.17	3.17	3.31	3.18	2.82
Total mean	2.80	2.85	2.86	2.79	2.86	2.73	2.92	2.85	2.58
Total N	44.00	108.00	106.00	48.00	127.00	25.00	66.00	59.00	26.00

Note: 1= strongly agree, 2= agree, 3= neither agree nor disagree, 4= disagree and 5= strongly disagree.

Note: Significant at 0.05 level for t-test or ANOVA are shaded.

4.34. Mean levels of agreement with important factors in recruitment are shown in Table 4.7 for sector, type of industry and workplace, and size of workplace.

4.35. There was general disagreement across all groups that age and closeness to retirement were important for recruitment decisions (all the means were greater than the neutral level of 3). The most important factors for recruitment were the candidate's fit with the job, employment history and motivation.

4.36. There were no significant differences between industry types, other than that those in non-service industry workplaces are significantly more likely to consider health/disability as important when it comes to recruitment.

4.37. Private sector workplaces gave significantly more importance to health and disability than other sector workplaces, however this might be due to more non-service work being conducted in the private sector. In the private sector workplaces, it was also found that closeness to retirement and how long they thought that the candidate would stay with the company were significantly more important than the other sector workplaces when recruitment was considered. Finally, the private sector gave significantly more importance to recommendations by another employer than workplaces who were in other sectors.

4.38. No significant differences in importance of factors for recruitment were found between single independent establishments and those who were part of a larger organisation.

4.39. Classifying by number of employees, no significant differences were found except for previous employment, which was considered more important for recruitment by smaller workplaces (11 to 50 employees) and least so for micro sized workplaces (10 or fewer employees).

Table 4.7 Means of important factors for recruitment

Important factors for recruitment	Industry type		Sector		Workplace type		Number of employees		
	Non-service	Service	Private sector	Other sectors	Single independent	Part of a larger one	0-10	11-50	51+
Recommended by another employee	2.41	2.80	2.34	3.33	2.61	2.92	2.57	2.59	3.05
Age	3.61	3.74	3.66	3.80	3.75	3.54	3.82	3.60	3.76
Closeness to retirement	3.46	3.63	3.43	3.89	3.59	3.57	3.63	3.46	3.81
Experience	1.54	1.64	1.60	1.60	1.63	1.46	1.70	1.53	1.57
Previous employment history	1.59	1.85	1.71	1.86	1.80	1.58	1.96	1.56	1.76
Fit with the advertised job/role/task	1.59	1.59	1.60	1.56	1.62	1.42	1.68	1.57	1.38
How long you think they will stay with the workplace	2.34	2.65	2.34	3.05	2.52	2.79	2.51	2.47	2.86
Candidate's motivation	1.46	1.51	1.48	1.50	1.50	1.42	1.52	1.36	1.76
Health and disability (physical/mental)	2.24	2.72	2.37	2.98	2.54	2.71	2.63	2.44	2.81
Total mean	1.79	1.99	1.85	2.09	1.94	1.90	2.00	1.82	2.02
Total N	44.00	108.00	106.00	48.00	127.00	25.00	66.00	59.00	26.00

Note: 1= very important, 2= important, 3= neutral, 4= not important and 5= not at all important.

Note: Significant at 0.05 level for t-test or ANOVA are shaded.

4.40.   Table 4.8 shows the mean levels of agreement that older workers are able to perform jobs that involve specific work activities, by sector, type of industry and workplace, and size of workplace. In terms of performance, all respondents agreed on balance that older workers can perform these tasks, and there is no difference between sectors or sizes of workplace.

4.41.   For industry type, service industry workplaces agree significantly more than non-service industry workplaces that older workers are able to perform jobs that require 'memory skills', as do single independent establishments when compared to workplaces that are part of a larger organisations. Single entity workplaces also are in significantly stronger agreement that older workers can perform in busy and/or noisy environments, undertake harsh physical working, driving tasks, working outdoors, tasks requiring the wearing of protective equipment, and when customer interaction is required.

Table 4.8 Older workers' ability to perform jobs that involve specific work activities

Older workers are able to perform jobs that involve	Industry type		Sector		Workplace type		Number of employees		
	Non-service	Service	Private sector	Other sectors	Single independent	Part of a larger one	0-10	11-50	51+
...working in harsh physical environments	2.68	2.63	2.64	2.65	2.56	3.00	2.63	2.59	2.70
...driving	2.18	2.05	2.09	2.09	2.03	2.39	2.10	1.98	2.25
...good vision	2.44	2.34	2.40	2.29	2.33	2.52	2.31	2.33	2.40
...good hearing	2.53	2.39	2.44	2.37	2.40	2.52	2.35	2.38	2.50
...working at height	2.57	2.68	2.60	2.66	2.57	2.82	2.50	2.78	2.45
...lifting	2.59	2.69	2.68	2.55	2.59	2.86	2.55	2.72	2.55
...working with computers	2.41	2.15	2.35	2.00	2.21	2.33	2.24	2.18	2.30
...delivery/courier work	2.43	2.31	2.36	2.29	2.30	2.55	2.31	2.26	2.53
...wearing personal protective equipment	1.84	2.10	2.01	2.02	1.95	2.35	2.08	1.94	1.95
...customer interaction	1.92	1.83	1.86	1.86	1.80	2.13	1.74	1.90	2.00
...working outdoors	2.11	2.21	2.17	2.17	2.07	2.61	2.10	2.10	2.40
...shift work	2.26	2.38	2.36	2.28	2.29	2.57	2.38	2.28	2.30
...working in a fast-paced environment	2.70	2.53	2.62	2.52	2.53	2.83	2.59	2.54	2.60
...memory skills	2.63	2.30	2.46	2.29	2.33	2.70	2.42	2.33	2.45
...working in a busy and noisy environment	2.39	2.36	2.39	2.31	2.27	2.78	2.37	2.31	2.45
Total mean	2.34	2.27	2.31	2.24	2.22	2.60	2.27	2.24	2.37
Total N	44.00	108.00	106.00	48.00	127.00	25.00	66.00	59.00	26.00

Note: 1= strongly agree, 2= agree, 3= neither agree nor disagree, 4= disagree and 5= strongly disagree.

Note: Significant at 0.05 level for t-test or ANOVA are shaded.

4.42.   Table 4.9[12] shows differences by sector, industry type and workplace type and size in the extent to which respondents perceived advantages to having older workers in the workplace. Overall, workplaces which are in the service industry, are not private sector workplaces, are single entities and are micro workplaces see more advantages to employing older workers than other workplaces. All workplaces value the reliability and experience of older workers, and think that they have good skills and knowledge, and the majority think they make good role models and mentors. Less value is perceived from older workers' ability to be flexible, undertake training and acquire new knowledge.

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[12] For Tables 4.9-4.12 Pearson's chi-squared test was used to test associations between categorical variables.

Table 4.9 Perceived advantages to having older workers in the workplace

Advantages to having older workers in this workplace	Industry type		Sector		Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)	Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
...are reliable	87.5	86.7	86.7	85.7	87.7	79.2	92.6	83.6	80.0
...can relate to our customers	47.5	63.3	60.0	54.8	60.4	50.0	74.1	47.3	45.0
... are experienced	97.5	93.3	92.2	100.0	95.3	91.7	94.4	94.5	95.0
...are loyal	70.0	72.2	71.1	71.4	73.6	58.3	74.1	70.9	65.0
...are productive employees	65.0	64.4	65.6	64.3	66.0	62.5	74.1	61.8	55.0
...are more flexible than younger workers	25.0	34.4	32.2	31.0	33.0	25.0	42.6	25.5	15.0
...are adaptable	27.5	40.0	32.2	45.2	36.8	33.3	42.6	32.7	35.0
...are good role models/mentors	77.5	76.7	73.3	83.3	78.3	66.7	77.8	78.2	70.0
...have good skills and knowledge	82.5	84.4	81.1	90.5	87.7	66.7	83.3	87.3	80.0
...are willing to learn new tasks	32.5	38.9	31.1	47.6	38.7	20.8	44.4	30.9	25.0
...are quick to absorb new knowledge	10.0	21.1	13.3	26.2	20.8	4.2	24.1	12.7	15.0
Average benefit	56.6	61.4	58.1	63.6	61.7	50.8	65.8	56.9	52.7
Total N	40	90	90	42	106	24	54	55	20

4.43. Perceived challenges to having older workers in the workplace are tabulated by industry type and sector, and workplace type and size, in Table 4.10. There was not that much variation across the sub-groups, with all citing the main challenges as adapting to new technology and, to a lesser degree, taking instructions from younger staff. Small and micro and single entity workplaces perceived more challenges than large workplaces and workplaces that are part of a larger organisation.

Table 4.10 Perceived challenges to having older workers in this workplace

Challenges to having older workers in this workplace	Industry type		Sector		Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)	Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
...would find it hard to integrate into this workplace	3.0	6.5	4.2	8.3	4.0	10.5	4.7	2.9	6.3
...cannot relate to our customers	0.0	1.6	1.4	0.0	1.3	0.0	2.3	0.0	0.0
...dislike taking instructions from younger workers	42.4	35.5	40.3	29.2	37.3	42.1	39.5	40.0	31.3
...are hard to train	18.2	24.2	23.6	16.7	24.0	15.8	20.9	22.9	25.0
...are inflexible	12.1	11.3	9.7	16.7	13.3	5.3	2.3	22.9	12.5
...are too cautious	9.1	19.4	12.5	25.0	14.7	21.1	14.0	20.0	12.5
...cannot easily adapt to new technology	87.9	62.9	73.6	66.7	74.7	63.2	74.4	71.4	68.8
...are disruptive in team meetings	6.1	0.0	2.8	0.0	1.3	5.3	0.0	2.9	6.3
...are risks to health and safety	15.2	3.2	9.7	4.2	9.3	5.3	2.3	17.1	6.3
...have poor physical health and stamina	24.2	12.9	16.7	16.7	14.7	26.3	16.3	20.0	12.5
...are more expensive to employ than younger workers	6.1	17.7	18.1	4.2	17.3	5.3	23.3	11.4	0.0
...are more likely to require time away from work	15.2	9.7	12.5	12.5	14.7	5.3	11.6	14.3	12.5
...are too close to retirement	3.0	21.0	12.5	25.0	17.3	0.0	16.3	17.1	6.3
Average challenge	18.6	17.4	18.3	17.3	18.8	15.8	17.5	20.2	15.4
Total N	33	62	72	24	75	19	43	35	16

4.44. Working arrangements available to older workers are shown in Table 4.11. Part-time working was one of the most common available arrangements and was most common in the service industry, non-private sector workplaces and small workplaces (11 to 50 employees). Special leave for compassionate or other reasons was also common, especially amongst larger workplaces. Ability to alter hours and reduce them was another common arrangement, more so amongst non-service industry, private sector and large workplaces.

Table 4.11 Working arrangements available to older workers

Working arrangements, available to older workers	Industry type		Sector		Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)	Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
Part-time working	85.2	93.0	85.7	97.3	88.8	94.4	86.5	93.2	88.2
Flexi time	37.0	53.5	46.0	51.4	47.5	50.0	51.4	43.2	52.9
Working at, or from, home in normal working hours	18.5	47.9	39.7	40.5	38.8	38.9	48.6	29.5	47.1
The ability to change set working hours or to reduce working hours	77.8	67.6	74.6	62.2	68.8	77.8	73.0	61.4	82.4
Compressed hours	14.8	28.2	19.0	32.4	25.0	22.2	18.9	22.7	41.2
Zero-hours contracts	11.1	11.3	14.3	5.4	11.3	11.1	16.2	6.8	11.8
Job share	14.8	26.8	15.9	35.1	15.0	55.6	10.8	25.0	41.2
Annualised hours	7.4	8.5	9.5	5.4	7.5	11.1	10.8	2.3	11.8
Phased retirement	51.9	35.2	34.9	45.9	33.8	66.7	27.0	40.9	64.7
Special leave (e.g. leave for bereavement, carers, unpaid, other reasons)	74.1	83.1	76.2	86.5	81.3	77.8	70.3	86.4	88.2
Total N	27	71	63	37	80	18	37	44	17

4.45.   As shown in Table 4.12, the most frequent practice to ensure that older workers' skills are kept up to date was to have regular reviews to assess training needs, and this was more used in non-service industry workplaces than service industry ones. The only areas where 'none' was the response were service industry workplaces, micro sized workplaces, single entities and the private sector. These are likely to be the same workplaces and to be micro sized workplaces. Requirements for line managers to encourage employees to take part in training were commonly used, especially in non-service industry workplaces, workplaces that are not micro sized, and non-private sector workplaces. Encouraging employees to act as mentors was quite often used with older workers, especially in non-service industry and large workplaces. Catering for individual learning styles was regularly undertaken by more workplaces - but less so for non-service industry workplaces and workplaces employing more than 51 workers.

Table 4.12 Practices to ensure older workers keep their skills up to date

Practices to ensure older workers keep their skills up to date	Industry type		Sector			Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)		Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
Regular reviews of training needs for all employees	96.0	85.7	87.3	91.4		88.4	89.5	78.1	97.4	93.8
Requirement for line managers to encourage employees to take part in training	80.0	63.5	58.2	82.9		65.2	73.7	43.8	84.6	75.0
Encouraging employees to act as mentors and mentees	76.0	63.5	67.3	65.7		65.2	73.7	65.6	61.5	75.0
Catering for trainees' individual learning styles	48.0	61.9	54.5	60.0		59.4	42.1	56.3	61.5	43.8
None – my workplace has no practices to ensure employees develop and maintain their skills	0.0	9.5	9.1	2.9		8.7	0.0	15.6	2.6	0.0
Total N	25	63	55	35		69	19	32	39	16

4.46. Most respondents stated that age, length of service and time left before retirement did not affect training being offered. For the few who replied 'yes', age was a slight influence for respondents from the service industry and potential length of service was mentioned a little more by respondents from larger workplaces. Time left before retirement was mentioned most by private sector workplaces (but only by seven respondents).

4.47. Respondents' retirement policies and practices are shown in Table 4.13. Most workplaces did not have a formal retirement policy or provide retirement planning services; those who did tended to be larger workplaces and not in the private sector.

4.48. When asked if consideration had been made of how suitable the workplace is for older workers, for most groups there was a three way near equal split between 'yes', 'no' and 'don't know' (see Table 4.14). Micro sized workplaces (fewer than ten employees), workplaces that are part of a larger organisation, the private sector and service industry workplaces were marginally more likely to have considered the suitability of the workplace for older workers.

Table 4.13 Retirement Policies and Practices

Retirement Policies and Practices	Industry type		Sector		Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)	Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
Has a formal policy for retirement	4.9	19.3	4.6	34.1	12.3	26.1	1.8	17.3	38.1
Provides retirement planning services for older staff members	10.3	22.1	11.9	30.2	14.6	36.4	5.7	17.3	52.6
Has a pension scheme to which the workplace contributes	67.5	74.7	64.7	88.6	69.2	87.0	48.1	88.2	95.2
N	44	88	87	44	106	23	55	52	21

Table 4.14 Consideration of the suitability of the workplace for older workers

Has consideration been made about the suitability of the workplace for older workers	Industry type		Sector		Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)	Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
Yes	29.7	32.2	35.4	25.0	31.7	34.8	42.3	23.5	30.0
No	43.2	36.8	42.7	31.8	43.6	21.7	42.3	39.2	30.0
Don't know	27.0	31.0	22.0	43.2	24.8	43.5	15.4	37.3	40.0
Total N	37	87	82	44	101	23	52	51	20

4.49. If information on the health, safety and wellbeing of employees was sought, most non-service industry workplaces sought information from 'occupational health' followed by 'specialist consultants' and 'ACAS' (Table 4.15). Service industry workplaces tended to use 'specialist consultants', 'trade unions' and 'occupational health'. Regardless of sector, respondents most frequently cited 'specialist consultants', 'specialist HR consultants' and 'occupational health'. For workplace type, single independent entities more frequently sought advice from 'specialist HR consultants' while workplaces who were part of a larger organisation relied on their own 'internal HR' units.

4.50. Larger workplaces were more likely to use 'specialist consultants', but the opposite was true for 'specialist HR consultants'. Micro sized workplaces cited 'government departments or agencies' and 'other' 21% of the time. For small workplaces, 'trade unions', 'ACAS' and 'occupational health' were cited 24%, 20% and 20% of the time respectively. For those employing more than 50 employees, 'occupational health' was cited the most (64%), then 'internal HR' (47.1%), then 'Healthy Working Lives Fife/Health Promotion' (41%); followed by 'ACAS' (35%). The detail is given in Table 4.15. Workplaces in the service industry, in the private sector, who are single independent entities or are micro sized were more likely to seek information.

Table 4.15 Source of information sought on the health, safety and wellbeing of employees

Source of information sought	Industry type		Sector		Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)	Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
Specialist consultant	28.6	28.0	31.3	22.6	27.1	33.3	26.3	26.8	35.3
External lawyers	14.3	10.0	14.6	6.5	8.5	22.2	0.0	9.8	29.4
ACAS	25.0	18.0	18.8	22.6	20.3	22.2	10.5	19.5	35.3
Trade Union	7.1	26.0	4.2	41.9	20.3	16.7	0.0	24.4	29.4
Employers' association	17.9	2.0	10.4	3.2	6.8	11.1	5.3	4.9	17.6
Occupational health	32.1	26.0	27.1	29.0	23.7	38.9	10.5	19.5	64.7
Charity/third sector workplace	3.6	8.0	0.0	16.1	5.1	5.6	5.3	7.3	0.0
Citizens Advice Bureau	0.0	8.0	0.0	12.9	5.1	5.6	5.3	4.9	5.9
Professional body	10.7	10.0	14.6	3.2	8.5	16.7	10.5	4.9	23.5
Government department or agency	17.9	10.0	10.4	16.1	16.9	0.0	21.1	7.3	17.6
Healthy Working Lives Fife/Health Promotion	14.3	16.0	10.4	22.6	16.9	5.6	5.3	7.3	41.2
Working Health Services	3.6	6.0	4.2	6.5	6.8	0.0	5.3	0.0	17.6
Fit for Work Scotland	7.1	8.0	6.3	9.7	6.8	5.6	5.3	2.4	17.6
Scottish Centre for Healthy Working Lives	0.0	6.0	0.0	9.7	3.4	0.0	0.0	2.4	5.9
Specialist HR consultant	21.4	34.0	29.2	29.0	33.9	11.1	31.6	31.7	23.5
Internal HR	21.4	18.0	16.7	22.6	10.2	44.4	5.3	12.2	47.1
Other internal adviser	10.7	2.0	6.3	3.2	1.7	16.7	0.0	2.4	11.8
Other (please specify)	10.7	6.0	10.4	6.5	10.2	5.6	21.1	4.9	5.9
Proportion not seeking information	36.4	53.7	54.7	35.4	53.5	28.0	71.2	30.5	34.6
Total N	28	50	48	31	59	18	19	41	17

4.51.   Respondents were asked whether there would there be the need to discuss, review and/or change policies, practices and procedures if the number of older workers working in their workplace increased substantially. Around half thought it would lead to the discussion of, review and/or change of fitness for work assessments, duties and physical adjustment to the working environment. This was particularly so for workplaces employing more than 51 employees. The relative proportions are displayed in Table 4.16. Non-service industry workplaces were more likely to perceive the need for discussion, review and/or change than service industry workplaces.

Table 4.16 Need for discussion of, review and/or change if the proportion of older workers substantially increases

Need for discussion of, review and/or change if the proportion of older workers substantially increases	Industry type		Sector		Workplace type		Number of employees		
	Non-service (%)	Service (%)	Private sector (%)	Other sectors (%)	Single independent (%)	Part of a larger one (%)	0-10 (%)	11-50 (%)	51+ (%)
... attendance management policies/procedures	33.3	27.1	32.7	25.0	30.6	30.8	31.0	28.1	33.3
... absence management policies/procedures	29.6	27.1	26.9	29.2	27.4	30.8	24.1	28.1	33.3
... performance management policies/procedures	29.6	29.2	26.9	33.3	30.6	23.1	24.1	28.1	41.7
... the nature of the work	33.3	37.5	32.7	41.7	32.3	53.8	34.5	34.4	50.0
... contracts	14.8	22.9	23.1	12.5	21.0	15.4	27.6	12.5	16.7
... fitness for work assessment	66.7	52.1	61.5	50.0	54.8	69.2	58.6	53.1	58.3
... duties	48.1	41.7	44.2	45.8	45.2	38.5	41.4	43.8	50.0
... flexible working	48.1	52.1	57.7	37.5	50.0	61.5	58.6	43.8	50.0
... career reviews	22.2	39.6	34.6	33.3	29.0	53.8	31.0	34.4	25.0
... learning and development reviews	40.7	43.8	40.4	50.0	41.9	46.2	41.4	40.6	41.7
... physical adjustment to the working environment	59.3	47.9	59.6	37.5	48.4	69.2	55.2	40.6	75.0
... the working day e.g. scheduling of shifts, the amount of overtime worked	40.7	43.8	44.2	37.5	43.5	38.5	41.4	34.4	58.3
Total N	27	48	52	24	62	13	29	32	12
Proportion of total population not indicating need for review	38.6	55.6	50.9	50.0	51.2	48.0	56.1	45.8	53.8

Summary

4.53.   In summary the key findings from the online survey of employers in Fife were:

- 61% of the workplaces had more than 20% of their workforce aged 50 plus.

- While workplaces were aware of the ageing workforce, the issue had not as yet been effectively addressed through the development or review of policies and practices. Few (below 30%) believed that changes would be required to policies, practices and procedures if the number of older workers increased substantially.

- Respondents identified a range of benefits to having older workers in the workplace, including their experience, reliability, and skills and knowledge.

- There were concerns that older workers could not perform jobs involving working at height, lifting, and working in a harsh physical environment. It was also felt by some that older workers cannot adapt to new technology.

- There were differences in attitudes towards older workers by workplace type:

  o Overall, service industry workplaces, those who are not private sector organisations, those who are single independent entities and those who are micro organisations perceived more advantages to employing older workers, than other workplaces.

  o Small and micro sized and single entity workplaces perceived more challenges than large workplaces and workplaces that are part of a larger organisation.

  o Micro sized workplaces, workplaces that are part of a larger organisation, the private sector and service industry workplaces were marginally more likely to have considered the suitability of the workplace for older workers.

- Just under two thirds (62.3%) would welcome information, support or advice on the ageing workforce and older workers, now or in the future, although 37.7% did not want information, support or advice.

- When information had been sought on the health, safety and wellbeing of employees, this information was most often sought from specialist HR consultants, specialist consultants and occupational health.

Chapter 5: Workplace practice case studies – findings from the managerial interviews

5.1.   This chapter draws on interviews conducted with 12 individuals from six workplaces in Fife who had roles that can be described as: managing director/business owner, HR manager, line/general manager, and/or occupational health roles. In some instances, due to the size of the workplace, some of those interviewed occupied one or more of these roles. Throughout this chapter these interviews will be described as 'managerial interviews' and the participants as 'managerial participants'. Interviews were also conducted with staff aged 50 plus in these workplaces, but these interviews are analysed and presented separately in Chapter 6.

5.2.   The managerial participants were interviewed using the interview schedule in Appendix 4. While the managerial participants reflected on their experiences as managers, HR and/or occupational health professionals, it also needs to be recognised that some were also aged 50 plus. Therefore, they also reflected on their own experiences of being 'older workers'.

5.3.   The chapter is structured as follows. First an overview of the participating workplaces is provided. The impact of the ageing population on the workplace is then considered, followed by a reflection on strategies used to enable the extension of working lives and perceptions regarding the abilities of older workers. The chapter concludes by reflecting on the support needs of workplaces.

5.4.   In Appendix 7 illustrative case studies developed from the interviews with the managerial participants are provided. Information for the case studies was also provided by the relevant managerial participants via email after the interview. Permission was given to name the workplace by the managerial participant whose interview was drawn upon to develop the case study. The consent form for managerial participants (Appendix 3) states *that "No individuals will be named in the writing up of the case studies developed from the interviews with members of managerial staff"*. The attributed quotes used in the named case studies were provided by the relevant managerial participants via email after the interview, and permission was given by the relevant managerial participant for the quote to be attributed.

The impact of an ageing population on the workplace

5.5.   This section considers the impact of the ageing population on the participating workplaces. The age profile of the workforce is examined before a discussion on how

the participating workplaces focus on individual need rather than age is presented. Key issues about retirement expectations are then discussed.

Age profile of the workforce

5.6. The managerial participants provided details of the age profiles of their workforce. In terms of the proportion of workers aged 50 plus, figures ranged from just over 10% of the workforce being aged 50 plus, to over 65% being aged 50 plus. Indeed, in two workplaces over 80% of the staff were aged 50 plus.

5.7. In one workplace it was felt that the proportion of older workers would only increase due to the low staff turnover: *"We don't have a large turnover of staff so our working population is only going to get older"*. Two other managerial participants who were interviewed together believed that in the next five years that the impact of population ageing would be felt because of the recent raising of the State Pension Age.

> Managerial Participant 1: *"It's more the changes to the pension. We haven't quite reached that point yet but we are conscious that in the next five years, things will change for us. Our workforce is generally quite stable…"*

> Managerial Participant 2: *"At the moment quite a lot of people are still entitled, a lot of people have been working for quite a number of years, you know 20 plus years, are still entitled to retire at 60…"*

5.8. In light of the proportions of workers aged 50 plus, managerial participants from three different workplaces discussed how there was an awareness of the need to ensure business sustainability. In two of these businesses there were strategies or schemes in place to take on and/or support apprentices or trainees.

5.9. A case study is provided in Appendix 7.1 which shows the link between schemes used to ensure business sustainability and phased retirement opportunities.

Focusing on individual need

5.10. Despite these trends the overriding message from the managerial interviews was that they tended to think about employees in terms of the individual rather than their age. Age was not felt to be relevant as such, and the needs of workers were dealt with on an individual basis. Thus terms like 'older worker' were not always relevant – although some did mention ages where someone might be thought of as 'older'.

> *"It's to do with the individual. If they're older, disabled, they have special needs, just deal with that as it comes"*

"Age has never been a barrier in terms of bringing anyone in and there is no such thing as a cut off when you say they're an older worker and they're a younger worker. They're all classed as the same …if they have got the skills and experience then [we will bring them in]*"*

"Everyone is treated the same irrespective of whether they are a 23-year-old…or [a] *70-year-old"*

5.11.   In some instances, the age discrimination legislation was also cited as contributing to this approach. Views about when a worker became an older worker and the effects of population ageing could also be shaped by the age of the managerial participants themselves, who did not think of themselves as being 'older'.

"I don't consider myself old…I am retiring, but I am not considering myself old yet"

5.12.   The focus on the individual rather that their age and extending retirement ages, could in part explain why there was not much evidence from the managerial interviews that the suitability of the workplace for older workers had been considered. Managers from two workplaces felt that it was up to the employee to decide whether they were able to do their work.

"If they are willing to come in then the assumption is that they're able to do so"

5.13.   While others had not made explicit consideration of the suitability of the workplace, it could be argued that because they offered flexible working and opportunities for lighter duties (which will be discussed more fully in the next section), they were employing age friendly practices to a certain extent. In addition, a manager from one workplace expressed that they would be willing to make physical adaptions to the workplace if a worker had specific access needs. Another manager from a different workplace cited that while the suitability of the workplace for older workers was not at the forefront of their mind, the building they operated from was modern and had been in built with consideration given to access (e.g. wide doors, electrical plug sockets that are high off the ground).

The retirement age

5.14.   The removal of the Default Retirement Age was also cited by some participants as changing how employers thought about age in the workplace. For some it meant that it was no longer an issue and the term older worker was no longer relevant.

"You don't think of that now the retirement age is gone. We don't really consider people in terms of their age as such, it is more about their capability"

> *"It probably isn't as meaningful as it used to be because we all retired at 60, so if you got to 50 you were in to single figures to retire. Now with no retirement age that doesn't really reflect an older worker now"*

5.15.   In this context, alongside the ability to work flexibly in some workplaces (which is discussed in more depth in the next section) the managerial participants mentioned that either they themselves or some of their workers would carry on working as long as possible. Sometimes there was a financial need to carry on working. In other instances, the enjoyment of working was the driving factor. The ability to continue working was primarily felt to be dictated by health. One managerial participant stated that: *"I don't think I will ever really stop unless health or something dictates"*.

5.16.   However, despite the legislative changes it was apparent from the interviews with the managerial participants that some older workers may still have a mind-set that they will retire at a certain fixed age. As one participant explained, during their working life there had been an expectation because of the ways in which the state pension was arranged, and with the Default Retirement Age, that people retired at either 60 or 65, or earlier. However, the changes in the legislation had moved the goalposts, so workers needed to rethink their plans as they would not necessarily be in the position financially to retire at the age they previously thought they would.

> *"I was always going to retire at 60. That was never going to be anything else until a few years ago when the government went hang on a minute, let's change the goalposts. I have a lot of friends that are struggling right now, that thought they were going to have their pension by now"*

5.17.   Another managerial participant mentioned that some of their workers were concerned that they could not keep working to 67 years (the State Pension Age will rise to 67 years between 2026 and 2028 (HM Government, 2014)) because of the physically demanding nature of their work.

> *"The* [workers] *are red flagging it. They are saying can we keep doing that? So where before there was a comfort that they would be retiring at 60, a lot of the guys in their 40s now are saying how is this going to feel for me being 67…I don't know if I can do that at 67"*
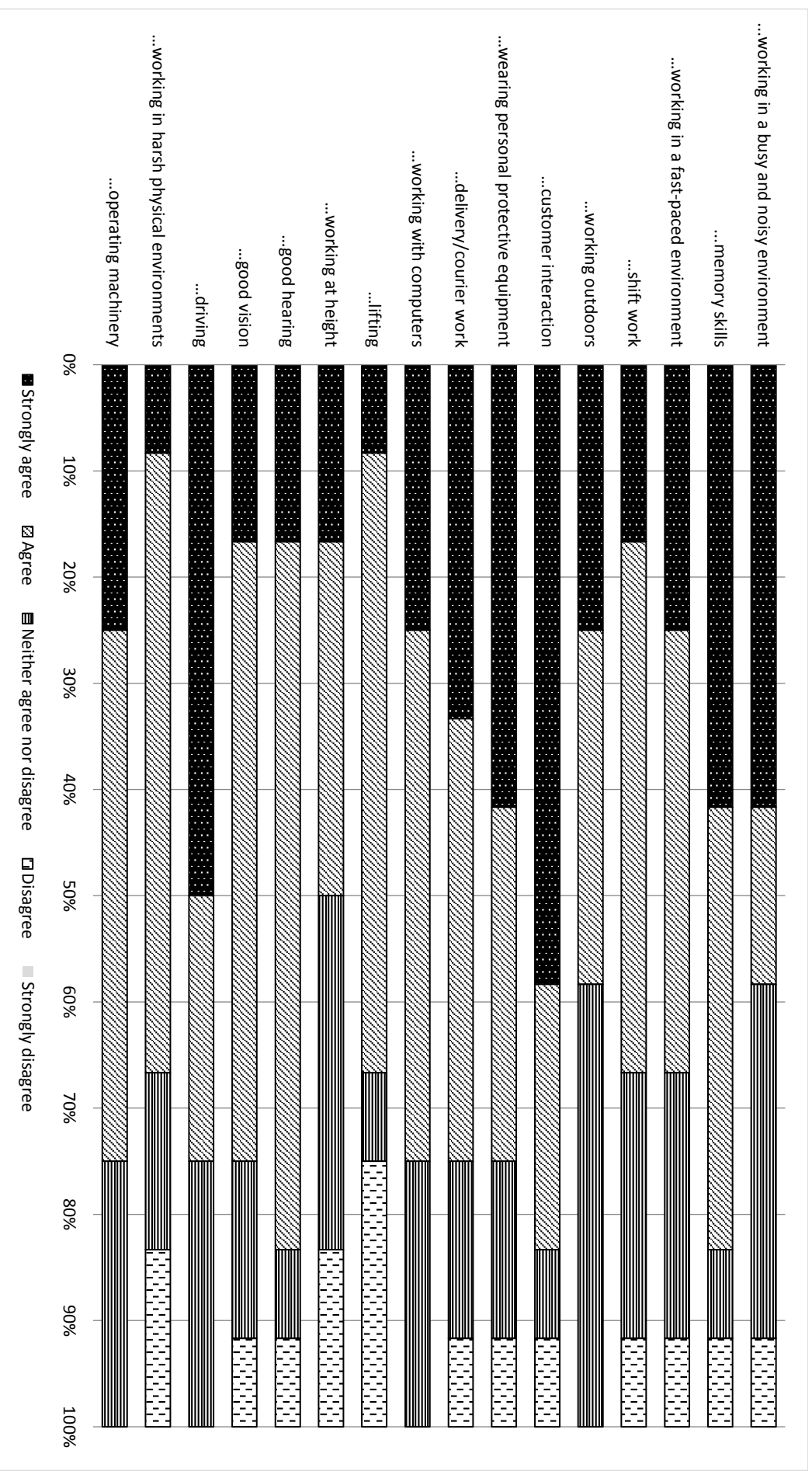
The abilities of older workers

5.18.   The managerial participants reflected on their perceptions of the abilities of older workers, considering both the advantages and disadvantages to having older workers in the workplace. The managerial interviews revealed a range of attitudes towards the abilities of older workers. Individual managerial participants expressed both positive and negative views of older workers.

5.19. However, before discussing these further it should be noted that all the managerial participants did express that in their workplaces it was the individual rather than their age which was important: *"Age doesn't play a part, it's the person, it's what they can bring, it's what they have right now"*. This could be in terms of physical capability, and also in terms of an employee's way of thinking: *"I would say I would put somebody as older if their thinking is older".* Therefore, it could be difficult to make assumptions about abilities based on age. It was also felt by managerial participants that it was good to have a mix of employees of different ages in the workplace because they brought a range of viewpoints.

5.20. With this in mind, we turn to examine the managerial participants' views regarding the abilities of older workers and the advantages and disadvantages to having older workers in the workplace.

The abilities of older workers to perform specific tasks

5.21. One of the central ways that the views of participants towards the abilities of older workers were gleaned were through asking them to rate through a self-completion question to what extent they agreed or disagreed that older workers are able to perform certain specified jobs (see Question 13 in the interview schedule in Appendix 4). The results are presented in Figure 5.1.

5.22. For the majority of the job tasks specified, over 50% were in agreement that older workers were able to perform jobs that involved these tasks. It was only in relation to 'working at height' where only 50% of participants were in agreement that older workers were able to perform jobs that involved this task. No participants disagreed that older workers could perform jobs that involved 'working outdoors', 'working with computers', 'driving' or 'operating machinery'. In relation to these tasks participants either 'strongly agreed', 'agreed' or 'neither agreed or disagreed'.

Figure 5.1 To what extent do you agree or disagree that older workers are able to perform jobs that involve... (Managerial interview participants)

5.23. A range of advantages to employing older workers were mentioned by the participants. Older workers were seen by the majority of the managerial participants to bring valuable life experience, skills, consistency and pragmatism to their work.

> *"I can only think of advantages. Life experience for a start is really important"*

> *"The skills, the knowledge, the consistency. They tend to be a lot more pragmatic…"*

> *"Their maturity and their experience that can come with them, nurtures the younger people in the team"*

5.24. They could act as mentors to younger workers – teaching them the 'tricks of the trade' and quicker and better ways of working. It was felt by one participant that older workers were key in teaching younger workers aspects of a job that were less tangible. They were also felt by some to have a better work ethic than younger workers and be better at timekeeping. Older workers were also felt to be an asset as they could relate to an older client base (see Appendix 7.2).

5.25. Older workers were felt to be more loyal in terms of being more likely to stay with an organisation for a longer period than a younger worker.

> *"The fact that we have older people also gives you a bit of stability…It gives you continuity, it gives you a bit of dependability, you also get more loyalty and commitment from people because they're in it for the long run"*

5.26. Perceptions about the loyalty of older workers were bound up with perceptions about the ambitions of older workers compared to younger workers. It was mentioned by some participants that older workers did not want to progress, e.g. take up promotion opportunities. Participants commented that *"there isn't that need to progress"* and *"they're not thrusting to get on and improve their lot"*. Older workers did not necessarily have the financial necessity to push themselves, as they would have paid off their mortgages and their children would be financially independent. This was seen as an advantage, as older workers would be more loyal to the organisations they were working for, and there was less of a risk of them leaving the organisation to take up other opportunities.

The disadvantages of employing older workers

5.27. A range of disadvantages to employing older workers were also cited by the participants. Some managerial participants felt that harder physical work was not

suitable for older workers, and some did equate ageing with an increased risk of illness and decreased physical abilities.

5.28. It is interesting to note that one managerial participant did feel that sickness and age were not linked, and that a high sickness rate in a workplace was the result of poor workplace practices such as placing too much stress on employees. They felt that sickness was therefore a business problem rather than an individual problem.

5.29. An arguably linked issue to ambitions, was a feeling that workers 'slowed down' as they aged, could not work at such a fast pace; were less willing to adapt; found it difficult/or did not want to work in such a pressured way; and might not be willing to work the long hours required in some workplaces.

> *"Sometimes you don't react quite as quickly or you can't or you haven't got the ability to absorb quite as much pressure and tension as you did in the past"*

> *"I have a very fast paced, very reactive* [job]*, if something happens I have to react to it…Could I do that in a few years' time? I don't know the answer to that, but I'm surmising possibly not, I wouldn't have the same energy"*

> *"*[Older workers] *tend to want more time off to themselves. They have generally paid for their house, their car, their family's up in age. So they want to have a more relaxed time at work and not work the hours that the* [workplace] *requires them to work or needs them to work"*

5.30. There was also a view amongst some participants that older workers could have a certain way of thinking that made them less flexible and adaptable to different ways of working.

> *"Disadvantages you will inevitably have some people who will say well this is the way I have always done it, so that's the way I am always going to do it…people need to be able to adopt and adapt"*

5.31. Examples were given in three workplaces where it was cited that technology had presented challenges to older workers. Some workers found it difficult to adapt to new technology, although in all three instances training was used to support workers. A case study of the experiences of one of the workplaces is provide in Appendix 7.3.

5.32. Other disadvantages associated with older workers that were mentioned by the participants included a lack of attention to detail, and increased risk averseness. In relation to risk averseness, two participants discussed how older workers could be too cautious, compared to younger workers, in their approach to business. As a result,

business opportunities may be lost: *"as you become older you become* [more] *risk averse…and that is not sometimes a good thing because it can shut down and cramp your operation to an element"*.

5.33.   A final disadvantage cited was closeness to retirement. While the knowledge and experience that older workers brought to a workplace were valued, there was an awareness that this would be lost once an older worker retired. As outlined previously, succession planning was important to ensure that this did not lead to skills gaps in the workforce.

> *"You know you're going to lose that knowledge and experience when they do decide to retire and you have to make sure that you plan for that so you don't end up with a skills gap"*

5.34.   There were conflicts in the narratives of some of the participants. While they may have stated that they did not consider the age of an employee, rather focusing on the individual in terms of skills, elsewhere in the interviews age and closeness to retirement was cited to be an issue.

Enabling the extension of working lives

5.35.   As outlined in the previous section, while there was not necessarily any explicit consideration of the suitability of the workplace, many of the participating work places offered working arrangements that could be described as age friendly practices - although they were available to employees of any age. It was clear however, that the majority of participating organisations did not have specific policies in place to manage the needs of older workers – for some this could be attributed to the size of the organisation which meant that they did not have HR departments to develop and implement policies such as these. As a result of this lack of policy, employee needs and adaption requirements were dealt with on an individual basis – whether it be an older worker or a younger worker. This is in line with the observation made earlier that the emphasis of organisations was on the capabilities of individual workers rather than the age of workers

5.36.   Despite the lack of policy, it was recognised by some participants that as people age they might want to work differently. For example, older workers might want to work more flexibly, decrease their pace of working or reduce their working hours in the run up to retirement. In most of the participating organisations there were opportunities for working flexibly and adapting to the changing needs of an employee (whatever their age). One participant stated that: *"if it suits them and it suits us then they can flex pretty much whenever they want to…as things change, and your circumstances change…we try and allow that"*. In another organisation for example, management

were very open to employees requesting different ways of working, e.g. flexible working. There was a lot of flexibility for those who might need adaptions to their work (e.g. being put onto lighter duties) because of illness for example. This option is available to all, regardless of age.

5.37.   As mentioned earlier there were however two organisations who offered phased retirement schemes, with the option for workers to reduce their hours ahead of retirement and take on different roles and responsibilities. A case study example is provided in Appendix 7.4.

5.38.   Flexible working options available, other than phased retirement schemes, included home working and options for 'light duties' for roles that were more physically demanding. It was clear that *"it's not frowned upon"* if workers used these options. Generally, it became clear during the interviews that there was managerial buy in and support for having this flexible and adaptable approach. Part of this can be explained by the fact that managers themselves might be older workers and looking to work differently.

> *"And if we are being purely selfish,* [the directors] *who are all past 50 thought, if we put down a set of rules, at some point in time it will apply to us. So why don't we put down rules that we would want to happen to us. And if it's alright to happen to us, it's alright to happen to everyone"*

5.39.   Technology was key in enabling home working.

> *"The fact that on Friday I was* [abroad] *with my I-pad, plugged into the server and sending emails, makes that possible…technology allows people to change their working patterns"*

5.40.   Home working was not a preferred option for all. For example, some liked the discipline of coming into work and the interaction with colleagues.

> *"It's never been attractive…I prefer the discipline of coming into the office, and the company as well"*

5.41.   Workplaces whose work involved physically demanding tasks, had mechanisms in place to monitor the health of their workers. A case study example is provided in Appendix 7.5.

5.42.   In terms of flexibility in roles, in some workplaces there will always be the need for workers to undertake physically demanding work when required. In one organisation

client needs also meant that workers were needed to work at certain times of day, thus reducing opportunities for flexibility.

Employer support needs

5.43.   The managerial participants were asked at the end of the interviews about what information, support or advice on the ageing workforce and older workers they would welcome now or in the future.

5.44.   The managerial participants from two workplaces felt that information on retirement and pre-retirement planning would be useful. It was felt that many people retired without knowing the support that would be available to them.

> *"It is a big shock to the system…a lot of people will retire with minimal knowledge about benefits entitlements, state pension scheme, what support networks are there, how to get involved in various groups, clubs, societies…what are the alternatives to day time TV"*

5.45.   The managerial participants reflected that this information and advice would need to be delivered to employees alongside other activities. They did not want to be seen to be targeting certain employees as it could be perceived that they expected an individual to be considering retirement.

5.46.   Other managerial participants felt that sharing of good practice examples would be useful. The sharing of practical ideas that other employers had implemented in particular was felt to be useful. For example, one participant discussed how they felt that working hours in their workplace might change in future. Therefore, ideas from other companies on how to think about the 'traditional' working week and making it more flexible might be useful. B&Q and Morrison's were cited by another managerial participant as having a number of older workers who had retired but then taken jobs with these two companies for social reasons.

5.47.   However, not all the managerial participants felt that they or their workplace needed advice – in terms of advice being directed at managers. One managerial participant however, did feel that advice for older employees might be valuable, in terms of those wishing to know about their rights with regard to flexible working for example.

Summary

5.48. In summary the key findings from the managerial interviews were:

- The overriding message from the managerial interviews was that managers tend to think about employees in terms of the individuals rather than their age. Age is not felt to be relevant as such, and the needs of workers may be dealt with on an individual basis.

- The managerial participants had a range of attitudes towards the abilities of older workers. Generally, these were positive (older workers bring valuable life experience, skills, loyalty, consistency and pragmatism to their work). Technology was felt to present barriers to older workers – although it also enabled more flexible working.

- While explicit consideration of the suitability of the workplace for older workers had not been made and age management policies were generally lacking, it can be argued that because some workplaces offered flexible working and opportunities for lighter duties, that age friendly practices were being employed. However, in some workplaces this flexibility was limited.

Chapter 6: Workplace practice case studies – the perspective of older workers

6.1. This chapter draws on interviews conducted with 17 individuals aged over 50 from the six workplaces who participated in the workplace practice case studies. The interviews used in this chapter will be described as 'older worker interviews' and the participants as 'older workers'.

6.2. The older workers were interviewed using the interview schedule in Appendix 4. The interviews differed from those in Chapter 5, in that the focus was on older worker's experiences of work. While the older workers worked in a range of industries and roles, some commonalities can be observed. This chapter will report on these commonalities as well as the specific features of work and how they relate to the experience of being an 'older worker'.

6.3. The chapter is structured as follows. Firstly, the attitudes towards the ageing population are discussed and what the participants reported an 'older worker' to be. Secondly, the chapter examines the perceptions of the abilities of older workers, with a focus on the limitations reported in employment of older workers. These limitations are discussed in terms of the physical limitations, mental limitations and the changes needed to address these issues. Finally, the chapter considers the views of the participants towards 'older workers' as a group in the workplace, and reports on the importance work plays in the lives of the older workers interviewed.

Adapting to the ageing population

6.4. This section considers the attitudes towards the ageing workforce that were reported by the participants. The older workers interviewed were asked the age at which someone would be considered an "older worker". This section reports those discussions. Furthermore, views regarding changes to the workplace that might be required as a result of the ageing population were examined.

The age of an 'older worker'

6.5. All the older workers were asked at what age they would consider an employee to be an 'older worker' in their workplace. The majority of those who answered the question tended to think above 60, with many of their comments being linked to those who worked beyond the State Pension Age. Most of the participants who would be considered, for the purposes of this research, an 'older worker' rejected the notion:

"I've never thought of myself as an older worker! I would say over 60, nowadays, rather than over 50. But that's maybe me, I don't feel old."

"Probably me! I don't know, a lot of people work longer and they enjoy it. I know somebody who left as well, who's 70 who went back to work. So… how do I answer that question? Everybody's different aren't they."
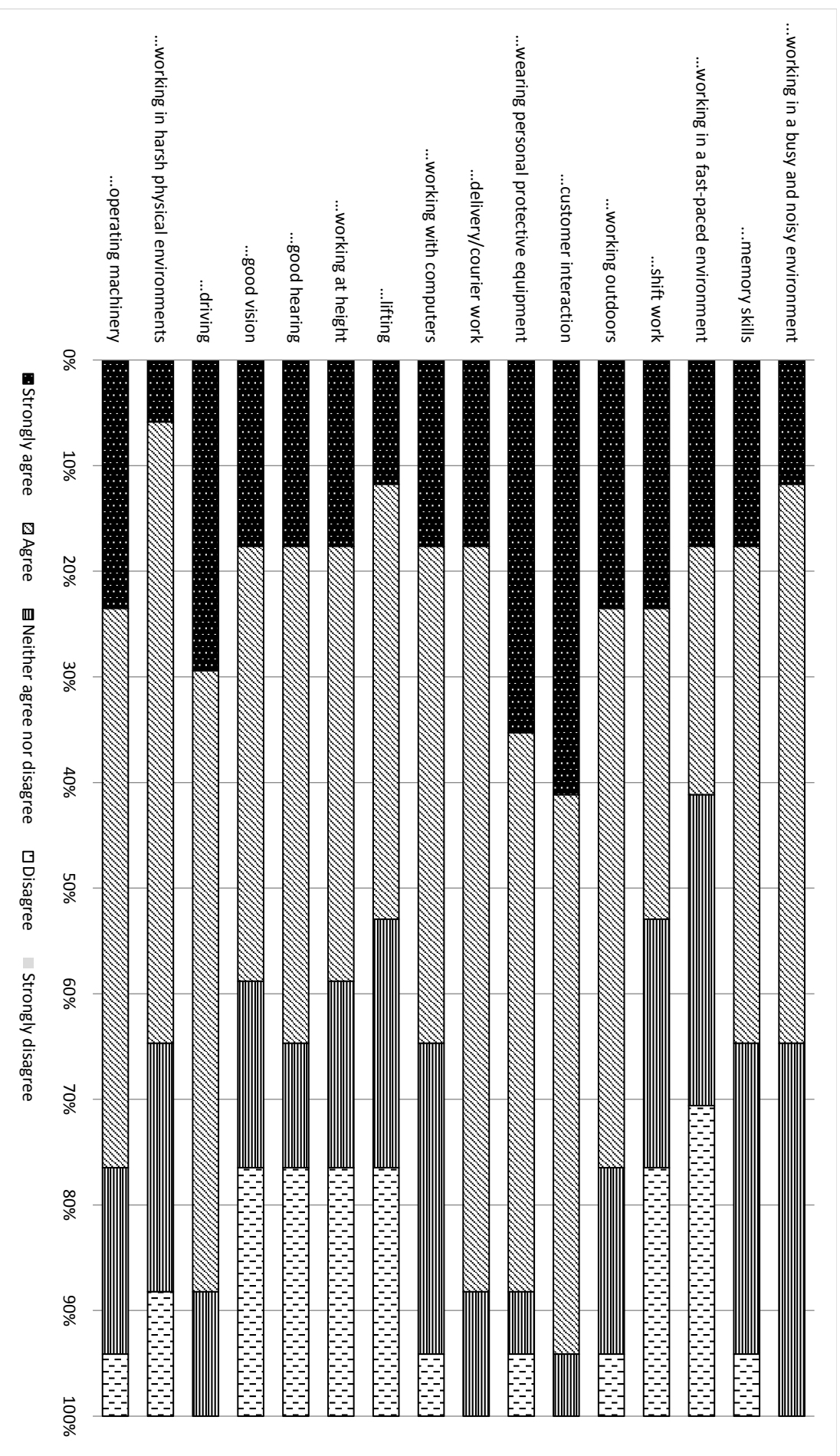
6.6. Importantly, the definition of an older worker was contrasted by many of the participants to their experiences when they were younger. For instance, many participants argued that an older worker currently is far different to how they would have defined an older worker when they were younger. In part this was because of legislative changes:

"Nowadays I think people, if you are in your 50s, when I was young and someone was in their 50s they were old. But I think people have changed. I think because the government changed the retirement age for women especially so I am thinking people see you maybe in your late 60s as old…I think there has been a change in the [last] *10 year…"*

The abilities of older workers to perform specific tasks

6.7. One of the central ways that the views of participants towards the abilities of older workers were gleaned was through asking them to rate through a self-completion question to what extent they agreed or disagreed that older workers are able to perform certain specified jobs (see Question 7 in the interview schedule in Appendix 4). The results are presented in Figure 6.1. The managerial participants were asked the same self-completion question (see Chapter 5).

6.8. Following the similar overall trend of the views of the managerial participants (see Chapter 5), Figure 6.1 shows that, when asked, the majority of the interviewees/participants agreed or strongly agreed that older workers were able to perform the job tasks listed. The highest level of agreement included: 'customer interaction', 'wearing personal protective equipment', 'delivery and courier work' and 'driving'. The lowest level of agreement was for 'working in a fast-paced environment' where only just over 40% either agreed or strongly agreed. Just over 50% agreed that older workers could perform jobs involving 'shift work' or 'lifting'.

Figure 6.1 To what extent do you agree or disagree that older workers are able to perform jobs that involve... (Older workers)

6.9.   This section considers the limitations that the older workers interviewed felt existed on their continued participation in the workplace. While physical limitations were overwhelmingly the most discussed examples of barriers, a number of office-based workers cited mental limitations on their work.

6.10.   Within the interviews with older workers, physical limitations were the most commonly discussed barrier to continued participation in the workplace – regardless of industry. While many would talk of physical limitations, only those undertaking physical work cited it as a potential personal barrier.

6.11.   The interviews with older workers revealed that in a number of the workplaces, supervisors devised strategies to manage ageing. These 'self-managed' processes are outside of company policies and are devised by the workers themselves. Rotating physical jobs, and pairing of older and younger workers were all observed strategies. The length of tenure in these physical jobs was used to justify this rotation, where younger workers would eventually benefit from these strategies.

6.12.   A lower number of participants cited mental limitations on their work based on their age. In these cases, the older workers cited their belief that they were slowing down in comparison to younger workers, taking longer to complete certain tasks or finding themselves more tired than they were.

> *"A lot of people, myself included, I have slowed down compared to the young ones. I can still do the job but I am a bit slower. I suppose when it comes to the fact that you can't do the job or are making too many mistakes then that would come into it…it depends on your mentality and physical"*

6.13.   As with physical limitations, some of the workers cited their ability to manage these factors in the workplace. Again, these processes were self-managed in that it is at the workers' discretion, rather than company policies, that these processes are enacted. One of the older workers cited the effects of stress and how they managed their work to avoid stress.

> *"You do as you get older get 'tireder'. To compensate that, I've got to work slimmer and more – more effective and efficient. To cut out the unnecessary things I do … so I can keep going"*

6.14.   As many of the workers interviewed did not consider themselves 'older workers', this often meant that they did not view the workplace as requiring changes to deal with older workers. Even in workplaces with a high level of physical demands, the workers often said they would expect to perform without adaptation. Yet, a number of workers

did mention that flexibility over shifts or potential phased retirements as one possible area for workplace adaptions to the ageing workforce.

> *"I would think I'm fit enough until I was – maybe if I got into my 60s I would sort of be ready to go down from* [full time hours]*"*

6.15. However, and reflected among all the workplaces, there was a feeling that should any changes be needed to adapt the workplace to older workers, the participants all felt their employers would make the required changes.

> *"I don't feel I like I need more support than somebody else…but I am pretty certain that if somebody needed support then they would get it"*

Attitudes to work

6.16. This section examines the attitudes to work of the older workers interviewed. Firstly, this section will show how the older workers viewed their contribution to the workplace in comparison to younger workers. While most older workers talked of experience, there were a few reported disadvantages. The section will then show how older workers view the importance of work and their satisfaction from work.

Advantages of employing workers

6.17. Reflective of the attitudes of the managerial participants in Chapter 5, many of the older workers felt that there were several advantages to employing older workers. Of particular note was the feeling that they were able to impart knowledge to their younger colleagues. There were similar answers regardless of industry, where the older workers were viewed as calmer, more mature and experienced and that these attributes were important in the various workplaces.

> *"Life experience. When you are older you take the younger ones under your wing and teach them what you know"*

> *"When you are slightly more mature there is not the same panic that you would have when mistakes are made…a mistake is not the end of the world, life goes on, calm down"*

6.18. A number of the older workers cited their view that older workers are generally more committed to their work and have a better work ethic than the younger workers. While many argued they understood because they were young workers once, others argued that this was a sign of generational differences

> *"I think it's been, bred into you. When you first start, when you're 16. And through the years. You are kind of committed to be at your work. My mum and dad said you're going into work, you're no staying off. But nowadays, young 'uns just do what they want"*

6.19.   Furthermore, changes to the value of the skills of older people were often cited as a key difference between older and younger workers. Some of the participants mentioned the fact that their IT skills presented a barrier. Other participants cited the changing requirements in the jobs market, e.g. in terms of qualification requirements.

Importance of work

6.20.   Generally, the older workers consistently cited a high degree of commitment to and enjoyment from their work. Indeed, the majority of older workers restated the importance of work throughout their interviews. Most important to all workers was a good sociable atmosphere in the workplace where *"everybody's getting on with everybody else"*.

6.21.   Widely noted in all the workplaces however was a lack of interest in promotion. While many argued that there were limited opportunities in any case, the majority of participants felt that promotion did not interest them. There were various examples within the interviews where opportunities for promotion were not needed, and most older workers considered their current jobs sufficient for them:

> *"I like the job I'm in, I like the environment, I'm happy to come to work. I'm at a stage in life where I'm not looking for a career and to move up the ladder. I've been there and done that in my old job, and this is just a job that I enjoy that I can do well, and I'm happy. It's not a job that has lots and lots of benefits, but I like it"*

6.22.   Even those that were likely to retire from their current jobs when able to did not rule out the possibility of working in some form after retirement.

Summary

6.23.   In summary the key findings from the interviews with older workers were:

- The age of an 'older worker' was considered by the participants to be older than that of the State Pension Age. Only a small minority of those interviewed considered themselves to be older workers.

- Few of the older workers interviewed felt that their workplaces would need to make substantial changes to their work or their workplaces in order to cope with the ageing population.

- Physical limitations however were generally discussed as a barrier to continued participation in the workplace. A minority of older workers cited mental limitations – such as stress and tiredness.

- The research found that in some cases ageing is managed at the level of employees, and below official management policies.

- The research has shown that older workers regard their experience as an essential contribution to the workplace. The perception that older workers are calmer, more mature and experienced was argued to be an important part of socialising younger workers in the workplace.

- Generally, the older workers felt they displayed greater levels of commitment to work and a greater work ethic compared to younger workers. The older workers all cited the importance of work to their lives.

Chapter 7: Discussion

7.1.   The purpose of this chapter is to draw together and reflect on the research findings presented in Chapters 3, 4, 5 and 6, and consider their implications in relation to future actions of Fife Health and Social Care Partnership, Fife Health and Wellbeing Alliance, and other stakeholders (hereinafter referred to as 'stakeholders').

The ageing workforce

7.2.   The secondary data analysis undertaken as part of this research (Chapter 3) highlighted that by 2039 both the 30-49 years and the 50-64 years' age groups are projected to decrease in size in Fife. This means that the core working age groups (as currently understood) will decrease in size, with the possible implication that older age groups will need to remain in the labour market for longer in order to meet labour demand.

7.3.   However, at present a significant number of those aged 51-64 in Fife are retired, although 42.9% of those aged 51-64 are working full time. As such, a significant number could be said to be retiring early (before State Pension Age). To ensure that there are no labour or skills shortages, employers and stakeholders supporting employers (for example, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance) may need to consider ways in which they can facilitate the extension of working lives and support older workers to work longer, if they wish to. It should be noted though that previous research does indicate that, even if employers expect labour market shortages, they do not see older workers as a potential solution (Van Dalen et al., 2009).

Attitudes towards older workers

7.4.   Respondents to the employer survey (Chapter 4) and the participants in the workplace practice case studies (Chapters 5 and 6) identified a range of benefits to having older workers in the workplace, including their experience, commitment, reliability, and skills and knowledge. Previous research has also identified positive views towards older workers in terms of skills, experience and attitude (Zheltoukhova & Baczor, 2016).

7.5.   However, as identified in previous research negative stereotypes about older workers are pervasive (Naegele & Walker, 2006; Ng & Feldman, 2012; Porcellato et al., 2010; Zheltoukhova & Baczor, 2016). In this current research, while many felt that older workers were able to perform jobs involving customer interaction, driving and wearing personal protective equipment; there were concerns that older workers could not

perform jobs involving working at height, lifting, and working in a harsh physical environment.

7.6. Physical limitations were generally discussed by the participants in the workplace practice case studies (Chapters 5 and 6) as a barrier to continued participation in the workplace. Workplaces whose work involved physically demanding tasks had mechanisms in place to monitor the health of their workers. It has been argued that in most jobs, declining health has little or no impact on performance; and roles and working environments can be adjusted (Nicholson et al., 2016). However, as this current research has shown, in terms of flexibility in roles, in some workplaces there will always be a need for workers to undertake physically demanding work when required.

7.7. It was also felt by some that older workers cannot adapt to new technology. The implications of this need to be considered given the increased digitalisation and automation of work (OECD, 2016; Störmer et al., 2014) and the role played by technology in enabling flexible working.

7.8. There were differences in attitudes between different types of workplaces. Previous research has shown that SMEs face a specific set of issues when implementing age management policies and strategies (Atkinson & Sandiford, 2015; Fuertes et al., 2013; Maxwell et al., 2007). The results from the employer survey (Chapter 3) show that for example small or micro sized and single entity workplaces perceived more challenges than large workplaces and workplaces that are part of a larger organisation. Future actions of stakeholders need to be sensitive to these differences in attitudes, as well as the potential barriers that SMEs may face in implementing age management policies and strategies.

Policies and practices to manage the effects of an ageing workforce

7.9. Despite participating employers in Fife having some awareness of the ageing workforce, the issue had not as yet been effectively addressed through the development or review of policies and practices. As reported in Chapter 4, only 23.3% of workplaces had considered how suitable their workplace is for older workers. Most workplaces responding to the employer survey did not have a formal retirement policy; those who did tended to be larger workplaces and not in the private sector. Few (below 30%) believed that changes would be required to policies, practices and procedures if the number of older workers increased substantially.

7.10. While explicit consideration of the suitability of the workplace for older workers has not been made and age management policies are generally lacking, it can be argued

that because some workplaces offered flexible working and opportunities for lighter duties (as identified in the workplace practice case studies presented in Chapters 5 and 6), that age friendly practices were being employed. However, in some workplaces this flexibility was limited.

7.11.   The interviews with older workers revealed that in a number of the workplaces, strategies to manage ageing are devised by the workers themselves on the ground, outside of company policies. For example, there could be rotation of physical jobs or older workers might manage their workload to avoid stress. Mismatch between policy (government and company) and day-to-day practice has been identified by others (Loretto & White, 2006a, 2006b; Parry & Tyson, 2009). Consideration needs to be given as to whether the presence of these on the ground practices points to the need to develop official company policies that can be monitored to ensure equitable and transparent implementation.

7.12.   Part of the reason for this lack of action may be because employers tend not to consider the age of their workers. The overriding message from the managerial interviews (Chapter 5) was that the managers who participated in the workplace practice case studies tended to think about employees in terms of the individual rather than their age. The removal of the Default Retirement Age has changed how some employers think about age in the workplace. Age was not felt to be relevant as such, and the needs of workers may be dealt with on an individual basis. As such terms like 'older worker' are not always relevant – one can infer that the development of specific age management policies may not be considered necessary when there are existing policies in place for all workers. When discussing support and advice requirements, the managerial participants (Chapter 5) also highlighted that employers do not want to be seen to be targeting certain employees as it could be perceived that they expected an individual to be considering retirement for example.

7.13.   Therefore, when engaging with employers, Fife Health and Social Care Partnership, Fife Health and Wellbeing Alliance, and other stakeholders, need to be aware that employers do not have policies or practices in place to manage the effects of an ageing workforce, and they do not necessarily see the need for these to be developed.

7.14.   The secondary data presented in Chapter 2 also highlights the importance of stakeholders taking into account the industry profile of Fife when considering the extension of working lives. Looking at the current industry profile of Fife shows that 'Wholesale, retail and repairs', 'Manufacturing', 'Professional, scientific and technical activities', 'Construction' and 'Education, human health and social work activities' are key sectors in Fife in terms of the number of units, employment and GVA. In Fife those aged 50 plus are most likely to be working in: 'Professional, scientific and technical';

'Construction'; 'Arts, entertainment and recreation'; and 'Financial and insurance activities' (although there are gender differences).

7.15. As shown in Chapter 1 the experiences of older workers are not homogenous across workplaces, and therefore it is important to consider the business profile when examining the situation of older workers in Fife. Certain sectors/industries such as construction are associated with poor practice towards older workers (McNair & Flynn, 2006a; Peters, 2011) while others such as health and social care sector have been found to have largely positive attitudes to older workers (McNair & Flynn, 2006b). Therefore, actions taken by the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance, as well as other key stakeholders, in supporting the older workers and their employers needs to be sensitive to the business profile and the practices that may be associated with different industries.

7.16. One key finding from the employer survey (Chapter 3) needs to be drawn attention to because of its significance in terms of future actions. Just under two thirds (62.3%) of the respondents to the online survey would welcome information, support or advice on the ageing workforce and older workers, now or in the future. However, 37.7% did not want information, support or advice. This may also explain the lower level of response to the online survey than anticipated despite the number of workplaces who were emailed the survey directly, and further publicity via social media etc. Therefore, stakeholders need to be aware that a significant minority of employers may not wish to engage with them. The authors of this report would contend that this does not necessarily mean that they do not require information, support or advice on the ageing workforce and older workers. Therefore, in working with employers, stakeholders need to be aware that there may be the need for a lot of groundwork in terms of engagement. This recommendation is applicable not just in the delivery of information, support or advice, but also to future research.

Chapter 8: Policy/practice recommendations and actions

8.1. The aim of the research was to investigate current knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife. This research has identified that while workplaces are aware of ageing workforce, the issue has not as yet been effectively addressed.

8.2. This final chapter draws together the research findings presented in the previous chapters to consider the policy/practice recommendations and actions arising from them. The action plan and policy implications have been co-produced with the Workplace Team, Health Promotion, Fife Health and Social Care Partnership and Fife Health and Wellbeing Alliance and other relevant stakeholder groups.

Policy/practice recommendations and actions

8.3. Six key research findings need to be considered in making any policy/practice recommendations and actions:

(1) The 'core' working age groups (as currently defined) in Fife are projected to decrease in size, with the possible implication (exacerbated by legislative, social and economic drivers) that older age groups will need to remain in the labour market for longer.

(2) Key sectors in Fife include those that have traditionally not been 'age friendly' (e.g. construction).

(3) Legislative changes are changing how employers think about age.

(4) While employers are aware that the ageing population will affect their workforce, employers have not considered the suitability of the workplace for older workers.

(5) Employers have reservations about the flexibility, adaptability and ability of older workers to absorb new knowledge. Technology is seen as a particular barrier for older workers.

(6) Many employers would welcome information, support or advice now or in the future, but many do not.

8.4. The following (linked) policy/practice recommendations and actions can be made:

- *Policy/practice recommendation and action 1 – Awareness raising activities*
  Activities need to be undertaken in order to raise awareness with employers in Fife of the impact of population ageing on the workplace, e.g. in terms of workplace policies and practices, the health and wellbeing of older workers, and succession planning. The ageing workforce needs to be promoted as an issue that employers need to actively engage with. One way in which to promote engagement is to stress the 'business case' – for example the business case for skills development and training for older workers.

- *Policy/practice recommendation and action 2 – Mapping the resource base*
  Before undertaking any awareness raising activities it is important to recognise that there is already an existing resource base in terms of initiatives, training, good practice examples etc.[13] Therefore, the existing resource base needs to be mapped (including: Fife based resources, Scotland and UK wide resources, and international resources) in order that efforts are not duplicated, so employers can be appropriately signposted to existing information, support and advice, and different providers can work collaboratively.

- *Policy/practice recommendation and action 3 – Identifying workplaces with a high proportion of older workers*
  The workplaces with high proportions of older workers need to be identified in order to target awareness raising activities, and consideration needs to be made of the best way to engage with employers. Working with intermediaries already engaging with employers may be the best way to identify these workplaces and to start the conversation about population ageing.

- *Policy/practice recommendation and action 4 - Policies and practices that are 'good for all ages'*
  A key question needs to be asked: do employers need specific policies and practices for older workers? All employees are ageing and the research findings suggest that employers focus on the individual rather than their age. Therefore, employers should be supported to develop policies and practices that are 'good for all ages' and to provide opportunities for employees of all ages.

- *Policy/practice recommendation and action 5 – Countering negative stereotypes*
  While employers are generally positive about older workers, negative stereotypes still exist. Employers need to be supported to untangle performance issues from

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[13] See for example - www.gov.uk/government/publications/help-and-support-for-older-workers/help-and-support-for-older-workers

ageing related issues. Therefore, alongside awareness raising activities, it may be appropriate to develop a toolkit for employers to make this assessment.

- *Policy/practice recommendation and action 6 – Framing the extension of working lives as an asset*
  Employers value the skills and experience that older workers bring. Any awareness raising activities etc. need to be framed in terms of seeing the extension of working lives and population ageing as an asset, rather than presenting problems that need to be addressed by employers.

- *Policy/practice recommendation and action 7 - Providing information, support and advice regarding retirement and good practice examples*
  There is a need to provide information, support and advice regarding retirement and good practice examples (especially for work that is physically strenuous where there seems to be concerns that older workers are less able take on these roles). In developing and/or providing this information, support and advice, policy/practice recommendations and actions 2 and 3 need to be taken into account. The case studies presented in Appendix 7 offer good practice examples that could be used by stakeholders, although further case studies (e.g. in other sectors) need to be developed.

8.5.   In developing and enacting any actions it needs to be recognised that the legislative, technological, social and economic is rapidly changing, and may be shaping employers' perceptions about the need to take action concerning older workers. These will also shape the experiences and expectations of employees.

Chapter 9: Conclusion

9.1.   The aim of the research was to investigate the current knowledge, understanding and management of an ageing workforce and older workers amongst workplaces in Fife.

9.2.   The research findings have shown that the 'core' working age groups (as currently defined) in Fife are projected to decrease in size, with the possible implication (exacerbated by legislative, social and economic drivers) that older age groups will need to remain in the labour market for longer in order to meet labour demand. To ensure that there are no labour or skills shortages, stakeholders may need to consider ways in which they can facilitate the extension of working lives and support older workers to work longer, if they wish to.

9.3.   The ageing workforce has not as yet been effectively addressed through the development or review of workplace policies and practices. Few of the participating employers believed that the ageing of the population would require changes to policies, practices and procedures, and they may also continue to hold negative views about older workers. While age management policies were generally lacking, age friendly practices were employed in some of the participating workplaces. In a number of the workplaces, strategies to manage ageing were devised by the workers themselves on the ground. Consideration needs to be given as to whether the presence of these on the ground practices points to the need to develop official company policies that can be monitored to ensure equitable and transparent implementation.

9.4.   A key message from the research, which will have profound implications for future action, is that while employers were aware that the ageing population will affect their workforce, they had not considered the suitability of the workplace for older workers. In addition, employers tended not to consider the age of their workers - the needs of workers may be dealt with on an individual basis. While many employers would welcome information, support or advice now or in the future about population ageing, many do not. Therefore, stakeholders need to be aware that employers may not wish to engage with them, or see the relevance of doing so.

9.5.   This research raises questions that need to be addressed in future studies – some of these are outlined in the policy/practice recommendations and actions (2 – Mapping the resource base; and 3 – Identifying workplaces with high proportion of older workers). Other areas for future research include an investigation of the disparities between the different types of working arrangements offered and the availability of these arrangements to older workers; and in-depth research with workplaces of different sizes and from different sectors to understand variations in policies, practices

and attitudes towards older workers. In conducting this research, the difficulties of engaging employers who do not see population ageing as relevant to them should not be underestimated.

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