



# **Labour Market and Training Experiences of Older Workers in the West Midlands**

**for**

**West Midlands Learning and Skills Council**

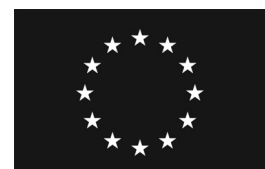
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# 1 EXECUTIVE SUMMARY

A summary of the main findings from the research into the Labour Market and Training Experiences of Older Workers is provided below. For a fuller outline of the findings, along with recommendations, see Section 13.

## Introduction and Secondary Data

- The aim of the project was to collect a robust evidence base from which the LSC can inform policies that impact older workers and learners. For the purpose of this research, 'older' has been defined as 50 – 70 years of age, although some variation has been necessary when analysing secondary data. The term 'older workforce' is used to embrace all individuals in the broad age band, regardless of their current employment status.
- The methodology consisted of desk research to review literature and policy relating to the older workforce; secondary data analysis of the demographics of the over-50 population in the West Midlands; primary research with the older workforce, consisting of 10 focus groups with older workers across the region; and a region-wide semi-structured telephone survey with 50 employers across the region.
- The latest mid-year population estimates (2006) show that there are over 5 million people resident in the West Midlands (5,366,600) of which the 'older workforce' age band of 50-64 years is close to 1 million (971,700).
- The proportion of residents in the West Midlands aged between 50 and State Pension Age (SPA) who are economically active is slightly lower (74.8%) than for all of working age (77.1%).
- Data from Census 2001 show that 14.8% of people of working age (16 to 64 years) in the West Midlands were recorded as having a limiting long-term illness. Within the 50-64 'older worker' age band, the limiting long-term illness rate is substantially higher, at 27.2%.
- Residents in the older working age bands in the West Midlands are more likely to have no qualifications, compared to residents in the younger age bands. 40.3% of residents aged 50-54 have no qualifications, as do 49.9% aged 55-59 and 59.2% aged 60-64. Only 26% aged 40-44 and 33.8% aged 45-49 have no qualifications.
- The LSC's Individualised Learner Records data show that there are 104,894 learners aged 40 plus in the West Midlands. Of this number, 28.6% are aged 40-44 years; aged 45-49 (22.9%); aged 50-54 (16.7%); aged 55-59 (12.7%); aged 60-64 (8.4%); and 10.7% are aged 65 and above.
- For all types of learning across the West Midlands 39.9% of learners are men, and 60.1% are women.

## Incentives and Barriers to Employment

- Older workers mentioned a variety of incentives and motivations to employment and an even wider variety of barriers to employment or career development: displaying the heterogeneity of this group.
- Generally the attitudes to employment from those who were in work were more positive than the attitudes of those of not in work. However, this positivity was tempered by comments about the modern world of work, in which stress and paperwork seem to abound.

- Several employed participants perceived larger employers to offer more advantages to older workers, including more structure in progression routes; better policies, such as flexible working and job share; and being more Age Positive.
- The main motivation for employment expressed by participants was the need for an income or financial security. Other motivations for work included avoiding boredom; socialising; a sense of purpose; progression; suitable hours; and stress reduction.
- Older workers had a wide variety of aspirations, such as changing to a new career; returning to a previous expertise; retraining; moving roles within a large organisation; continuing on a progression route with a large organisation; and winding down to retirement.
- Participants currently in employment expressed more career aspirations than those not in employment; and younger participants expressed more ambition to progress than older participants. Women seemed more open to retraining as a means of developing their career, than men were.
- Older people mentioned a wide variety of potential barriers to employment, including their own attitudes<sup>1</sup>; some transport issues; employer attitudes (especially in 'younger profile' sectors such as IT); health; caring responsibilities (especially for women); and discrimination, on grounds of gender, ethnicity, age and even area of residence. While most employers interviewed stated that they were not discriminatory in any way, older worker participants were less sure.

### **Employer Attitudes, Policy and Practice**

- Implementation of policies and practice relating to age was not consistent across employers in the West Midlands.
- Many of the older workforce participants, both employed and unemployed, were doubtful as to the efficacy of anti-age discrimination policies and the law relating to recruitment.
- There is evidence that organisation size affects the likelihood of the existence of age-related employment policy and data monitoring. The larger the company, the more likely it will be to have an equal opportunities policy mentioning age and that age data will be monitored to identify discrimination.
- There is no relationship between the size of organisation and proportion of older workers on the workforce. Practice may not be directly affected by the existence of formal policies relating to age although further research would be needed to verify this.
- There was little overt evidence in this research of a division between public and private sectors in relation to recruitment policy and practice, as some national studies have previously found (McNair, Flynn and Dutton, 2007).
- Employers are addressing recruitment challenges in a variety of ways. However, specifically targeting older workers was not generally seen as a solution by employers.
- Employers taking part in this research were generally positive about the contribution that older workers can make to the workforce. This may be because

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<sup>1</sup> Such as negative attitudes towards training, qualifications, IT, modern stressful work environments, as well as a nostalgic attitude towards declining industrial sectors, for example, Manufacturing.

employers willing to take part were more likely to have a positive attitude or good practice and policies relating to age (although by no means all respondents outlined good practice), or because interviewees wished to give positive messages about older workers given the nature of the research. Alternatively the belief and theory propounded by employers may not be matched in practice.

- The advantages of employing older workers mentioned by employers matched those given by the older workforce themselves. Advantages perceived by employers included personal qualities, such as loyalty, experience and reliability; existing skills including communication and time management skills; and practical advantages such as better retention, less training needed, and fewer family or childcare commitments.
- Employers had a tendency to say that there were no disadvantages of employing older workers: exhibiting some unease that they might be seen as discriminatory. Disadvantages mentioned included health issues; fitness,(especially for physically demanding jobs); and reluctance to change or train.
- Employers listed a variety of skills gaps/shortages. Employers from the Manufacturing sector within the region stated that they were experiencing a shortage of engineers and operatives. Secondary data analysis showed that skills gaps for technical and practical skills and for skilled trades and operatives in the region were above the national average.
- Employers said that the experience and qualifications they were seeking included personal qualities; professional qualifications/degrees for professionals and skilled trades; skills and experience for non-professional roles; literacy and numeracy skills; and industry sector experience.
- Awareness of anti-age discrimination varied amongst both the olderworkforce and employers.
- Just over a quarter of employers said that the anti-age discrimination legislation had not made an impact on their practice 'on the ground'. In some cases, this was because they believed they already had good practice in place, in others they were rather vague about the implications of the anti-age discrimination law.
- There is evidence of variation in employer practice, especially by size, relating to the management of retirement. Some employers are still unaware of the law relating to the management of retirement, and only a few employers interviewed seemed to have 'gone the extra mile' in supporting older workers as they enter retirement.
- The majority of employer respondents stated that their organisation had an official retirement age, mainly of 65 or SPA. The remainder said that their organisation had no set retirement age. Over half of employers interviewed cited examples of employees who had stayed on beyond SPA.

### **Financial Provision for Retirement**

- Older workers from across the West Midlands took a variety of approaches to providing for themselves in retirement, including occupational pension provision; investing in property; and working after retirement.
- There was some variation in the attitudes and experiences of those who had recently retired and those who were still in employment; between those with secure occupational schemes, and those without; and between men and women. Older women in particular complained of inadequate pension provision, having

relied on their husbands' schemes, while younger women were more proactive about contributing to a pension.

- Discussions about preparing for retirement were mainly based on monetary issues, but there was also a mention of quality of life, exploring voluntary work or part-time work. Older worker participants showed little or no awareness of tax concessions allowing them to draw down pensions while in continuing in some paid employment.
- The main motivation for working after retirement was seen by participants as money. Several participants expressed concerns about being able to afford to retire. Working after retirement was also seen as an antidote to boredom.

### **Alternative Working Patterns and Self-Employment**

- Participants touched on the benefits of alternative working patterns for their lives, including flexi-hours, part-time working and job share. Some were already employed in a part-time or voluntary capacity. However, only a few had experienced flexible working in their workplaces.
- Of the employers interviewed, just over a quarter mentioned offering some form of flexible hours or flexible working for staff (generally not differentiated by age). Of these employers, all but one were medium-sized to large organisations.
- The feedback from employers implies that flexible working practices are far from uniform. Manufacturing respondents indicated that working practices in their sector were less flexible.
- Self-employment can be a means of staying in work for older workers. Nationally, growing numbers of over 50s are taking this option, and the Government views it as a way of extending working lives. The advantages of self-employment were seen as freedom to do what you want; earning capacity; and reaping the rewards of hard work. The disadvantages of self-employment given by participants were competition; not having a marketable skill; legislation, tax and paperwork; costs/outlay versus returns on investment; insecurity; lack of company benefits; benefits trap; and long hours.

### **Training and Learning for the Older Workforce**

- The majority of participants who had engaged in recent training, had been employer-funded, generally within larger organisations in the Public, Educational or Health and Social sectors. Self-funded training was mentioned more rarely. Only a few participants had engaged in non-vocational learning.
- A variety of motivations for training were put forward by participants. Perceived barriers to training and learning including: employer attitudes, cost, time and transport. Barriers to training older workers mentioned by employers were similar: older workers' attitudes, time and cost.
- While two participants mentioned learndirect in relation to training, there seemed to be generally low awareness amongst older people of routes into training, especially from the unemployed from more deprived urban areas.
- Employers stated that their decisions to train staff were based on a number of factors, generally relating to the job role (not on age).

## **Information, Advice and Guidance**

- It is one of the main findings of this research that there was low awareness and little or no experience of careers information, advice and guidance (IAG) for adults across the older workforce.
- While awareness and experience of IAG was low, members of several groups expressed a need for the services that IAG can provide, including advice and support with interview technique, help with CVs and careers guidance.
- A variety of sources of IAG were suggested by participants. learndirect was mentioned by only one person in this context, and nextstep by no-one. The Jobcentre was mentioned by several participants across different groups, both those who were working and workless. However, perceptions of Jobcentres were generally negative, especially by older workers who were unemployed.
- Delivery of IAG through Jobcentre Plus is likely to be effective, especially for the unemployed, given the higher awareness by participants of Jobcentre Plus' potential role as a source of IAG. However, older workers' negative perceptions of Jobcentres need to be tackled.

## 2 INTRODUCTION

The LSC and its partners<sup>2</sup> are actively encouraging more older people to participate in learning, as part of the Government's drive to enable those most excluded from the labour market and society to progress into learning and employment. The LSC wants to diminish or eradicate negative stereotypes that prevent older workers gaining the skills they need to gain work and develop their careers. Given the skills gaps faced by employers and current demographic trends, older workers are a valuable asset to the workforce. The LSC is seeking greater recognition of this fact by employers and wider society in the West Midlands.

VT Research was commissioned through a competitive tender process by the LSC West Midlands in May 2008 to undertake qualitative research looking at the labour market and training experiences of older workers. The project included primary and secondary research with a view to collecting an evidence base from which the LSC can inform policies that impact older workers and learners.

### 2.1 Aims and Objectives

The project's aim as set out in the brief was to collect a robust evidence base from which the LSC can inform policies that impact older workers and learners.

The specific objectives for the secondary and primary research include:

#### Secondary Research

To investigate or provide:

- Overall demographics of the over-50 population in the West Midlands, including projections.
- Economic activity of residents aged over 50, labour market participation and reasons for economic inactivity.
- Sectors and occupations in which older workers are participating.
- Sizeband of employers.
- Qualification levels of older workers and their relevance to employment
- Training and learning activity undertaken by older workers/residents.

#### Primary Research with the Older Workforce

To investigate:

- Contentment with current employment.
- Future employment aspirations and the motivations for these as retirement age is approached.
- The extent to which the over-50s are already undertaking training and learning.
- Knowledge of and engagement with information, advice and guidance (IAG) services.

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<sup>2</sup> The European Social Fund (ESF) contributed to this research. The ESF has targets set for engaging 50+ residents in the West Midlands. These are 5,700 unemployed 50+ residents (18% of the adult unemployed target total) and 10,500 employed 50+ (20% of the adult employed target total).

- Training issues related to employment – attitudes, motivations and barriers to further training and acquisition of new skills.
- For those involved in training and learning, preferred learning methods and formats.
- Barriers to training and learning, and barriers to further career development.
- For those who are currently unemployed or economically inactive but would like to work, attitudes, motivations and barriers to learning and training to develop new skills. Access issues to that training and learning and any external impediments to training and employment.
- The extent of, and attitudes towards, self-employment.
- How older workers are addressing retirement and pension planning.
- The extent to which a 'hidden pool of skills' is apparent, made up of experienced workers currently outside the labour market.
- Awareness of anti-age discrimination legislation and opinions of its success since implementation in 2006.
- Implications of health issues on older workers' employment aspirations.
- If and how these issues affect older workers differently in relation to gender and ethnicity.

### **Primary Research with Employers**

To investigate:

- The advantages or disadvantages of employing older workers from an employers' perspective.
- Employers' attitudes to the debate around experience versus qualifications as the basis of employability.
- Willingness of employers to actively seek to employ older workers and their rationale for doing so (or not).
- Any specific practices or policies that employers have in place related to the employment of older workers and any examples of good practice.
- Awareness of anti-age discrimination legislation and its impact on business practices.
- A sectoral dimension to try and understand if and why certain sectors are more likely to employ older workers and if in these sectors older workers are more likely to be undertaking certain occupations.

### 3 METHODS

This section outlines the multi-modal methodology used for this research into the labour market and training experiences of older workers in the West Midlands.

#### 3.1 Desk Research

Desk research was undertaken to review the existing policy context relevant to the training and employment of older workers. Researchers used the internet and other sources, including libraries, to locate policy documentation and other literature.

#### 3.2 Secondary Data Review

VT Research reviewed quantitative secondary data in order to provide a picture of the demographics of the over-50 population in the West Midlands, their qualifications, training and learning and employment.

This element of the project included analysis of:

- **Individualised Learner Records (ILR):** ILR data was provided by the LSC. The driver for analysis of this data was to investigate the characteristics, participation and learning aims of people aged 40+ in the region at present.
- **Annual Population Survey (APS):** To provide overall demographics of over-50 population in the region, including employment, health and economic activity/inactivity.
- **Annual Business Inquiry (ABI):** To provide the sizeband of employers, and expanding and declining sectors in the region.
- **National Learner Satisfaction Survey (NLSS):** For qualifications and subjects by age.
- **National Employer Skills Survey (NESS):** For training expenditure and skills gaps.

#### 3.3 Older Workforce Focus Groups

To obtain older workers' views about their labour market and training experiences, 10 focus groups were held with people aged over 45 across the region during July 2008. At least one focus group was held in each of the six LSC sub-regions:

Location	Ethnicity	Work Status	Age
Birmingham and Solihull	Black	Retired/seeking work	50 – SPA
Black Country	Asian	Working	50 – SPA
Shropshire	Any	Workless (voluntary)	50 – 70
Black Country	Any	Workless (enforced)	50 – 70
Herefordshire and Worcs	Any	Working	45 – SPA
Staffordshire	Any	Working	50 – SPA
Staffordshire	Any	Working	50 – SPA
Coventry & Warwickshire	Any	Working	45 – SPA
Herefordshire and Worcs	Any	Half in work	55 - 70
Birmingham and Solihull	Any	Half in work	55 - 70

Two groups were with people from ethnic minority backgrounds: one group of Afro-Caribbean older workers; and another with Asian older workers. Two groups were

convened with workless people aged over 50: one held in the Black Country; and the other in Shropshire, to see if there were differences between urban and rural areas. Overall, 79 participants took part in the focus groups: 52 women and 27 men.

The discussion guide used to consult with the older workers included the following question areas:

- Current employment situation.
- Future career aspirations.
- Barriers to career development.
- Self-employment.
- Any training and learning activity undertaken, and perceptions of training and learning.
- Any barriers to training and learning.
- Awareness and experience of careers information, advice and guidance (IAG).
- Planning financially for retirement.
- Awareness of anti-age discrimination legislation.

Subsequent to the focus groups, 5 telephone interviews were conducted with older people to explore the research questions further in light of the data gathered.

### **3.4 Employer Semi-Structured Interviews**

A qualitative consultation with employers was undertaken across the region during August 2008. Fifty small, medium and large employers from the six LSC sub-regions were interviewed using a semi-structured discussion guide. 19 small employers (3-49 employees); 20 medium employers (50-199 employees); and 11 large employers (200+ employees) were interviewed from a variety of sectors. Employer representatives were employed in senior roles, including HR managers, managing and finance directors, and higher level managers.

The discussion guide used to consult with employers included the following question areas:

- Skill gaps and requirements for qualifications and experience.
- Employer attitudes to older workers, including perceived advantages and disadvantages.
- Employer attitudes to training.
- Employer attitudes to flexible working.
- Policies and practice relating to anti-age discrimination and managing retirement.

## **4 LITERATURE AND POLICY REVIEW**

### **4.1 Introduction**

The needs of the older workforce and the labour market have become an increasingly important subject of recent years, in response to demographic and social change. This has resulted in legislative reform, which has been the catalyst for a raft of research and guidance for employees and employers, and a wide range of policy and strategy reports preparing everyone for the new regime.

A number of specialist organisations exist which address the issues facing the older workforce, and promote age equality and diversity, and these are a good source of research material. Nationally, 'Age Positive' is the Government's campaign dedicated to combating ageism in the workplace and encouraging a mixed age workforce. The Age and Employment Network (TAEN), also operating nationally, advocates active 'Age Management', incorporating interventions at the level of individual older people, the labour market or organisations (TAEN, 2007). There has also been extensive research by Government agencies, charities and specialist campaigning organisations including the National Institute of Adult Continuing Education (NIACE), Age Concern, the Joseph Rowntree Foundation and the Fawcett Society. The vast majority of available material is focused nationally, although there is a small amount of material available with a focus on the West Midlands, particularly that of the Coming of Age Partnership.

Against this context, this review concentrates on the literature leading up to the introduction of legislation (from around 2003/4), and that produced since. This approach is particularly useful, as much of the research available prior to 2003/4 has been rendered obsolete by the new legislative framework. At the time of writing this report, the age discrimination legislation has been in place for nearly two years, and new research is available which analyses the effects of the legislation on workplace attitudes (both employer and employee) and employer practice. New studies are emerging all the time and those involved in the area of older workers should take advantage of this growing area of knowledge. At the same time, the current investigation revealed a dearth of research around specific groups within the cohort of older workers, for example, those with disabilities and older people from ethnic minority groups.

### **4.2 Policy and Legislative Context**

Extending working lives is a key policy focus in the UK (as well as across Europe), to meet the Government's target to have 80% of the working age population in employment. This goal is supported by a range of policies and legislation, which are needed to meet the complex challenges facing both older workers and employers (European Commission, 2006; Mitton and Hull, 2006; TAEN, 2007a and 2007b).

As a consequence, various legislative and policy measures concerned with combating the disadvantages older workers may face, both in the labour market and in society in general in recent years, have emerged. The Employment Equality (Age) Regulations (2006) were passed by Parliament and came into force on 1 October 2006, outlawing discrimination in employment. The Regulations also affect the provision of vocational training by employers or providers in the public and private sectors, meaning that age limits may not be set unless these can be 'objectively justified' (Age Positive / DTI, 2006). The inception of the Equality and Human Rights

Commission in October 2007 ensured that there is now a body with responsibility for promotion of, and enforcing, anti-discrimination legislation, including these Age Regulations (Equality and Human Rights Commission, 2008). Legislation will provide further protection against age discrimination in the provision of 'goods, facilities and services or carrying out public functions', enabled by the Single Equality Act which is currently under development (Equal Opportunities Review, 2008).

The introduction of legislation against age discrimination has started to show effects in a number of ways. There has not been the predicted 'flood' of Employment Tribunal claims, though the number presented to March 2007 (972) outstripped those brought under similar legislation for religion and belief or sexual orientation. The 19 awards, made under the age discrimination legislation were, however, greater in the first year than those under Disability Discrimination Act during the same period, although the compensation amounts are considerably lower than for other discrimination strands (Equal Opportunities Review, 2008a). This may reflect the fact that, although such discrimination is widespread, with research for Age Concern in England showing 29% of people had experienced it (compared to 24% for gender), many people regard it as 'normal' (O'Neill and Welsh, 2006). Recent surveys show, for example, that two thirds of over-fifties feel that they are turned down for a job because they are too old (The Cabinet Office, 2008).

### 4.3 Definitions

There is no universally agreed definition of 'older worker'. Segmentation of the workforce by age differs by sector and by size of company (McNair, Flynn, and Dutton, 2007). A small number of organisations consider 'older' workers to be 45+, but the vast majority focus on the 50+ age group. The older workforce, however, is far from homogeneous, with differences in attitudes apparent according to gender and age, socio-economic class, etc. This literature review focuses mainly on the 50+ age group, with some exceptions, for example a small number of professions or trades (such as marketing and ICT) where employees perceive that there is discrimination from a much younger age than in other sectors (Goodwin, 2006; [www.brandrepublic.com](http://www.brandrepublic.com), 2006).

Within this 50+ 'category', there are considerations about who might be addressed when trying to draw further individuals into the labour force, and estimates of the numbers vary. TAEN (2007a), for example, argues that 45% of non-working people in this age group are not on benefits, and therefore are likely to be the more highly skilled and qualified. They conclude that at least 50% of this sub-group want to work, and are therefore an important potential resource. Smallwood and Obiamiwe (2008), estimate that these individuals add up to a 'reserve work force' of 800,000. The Leitch Review (2006) supports the idea of older workers as this important resource, whilst acknowledging that they will need to reskill in order to meet the skills gaps faced within the UK economy (Leitch, 2006).

### 4.4 Demographics

In common with the rest of the developed world, the UK workforce is ageing, with the proportion of the population aged between 50 and 69 projected to rise by 17% by 2016 whilst the number under 50 falls by 2%. Alongside this, employers are experiencing increasing skills shortages.

Furthermore, the nature of retirement is changing, as life expectancy has increased in Britain, therefore increasing the proportion of a person's life that they spend retired. This has led to more people remaining in employment past retirement age, both to finance a longer retirement and to occupy themselves in a meaningful way. The rate of employment for men aged 50-65 is at its highest since the 1980s with 1.3 million people working past retirement age – a rise of 8.8% in the past year alone (Equal Opportunities Review, 2007; People Management, 2008). However, some employers' attitudes appear to lag behind, evidenced by a recent survey by a large insurer, which found that as many as one in five workers retiring before age 65 have been forced into it by their employer (Labour Research, 2008). Furthermore, many people still leave the labour market prematurely, commonly because of ill-health (Equal Opportunities Review, 2007).

## **4.5 Employment**

### **4.5.1 Employer Practice**

As a result of the age discrimination legislation, a number of governmental, professional and trade organisations have produced good practice guides and checklists for employers (Age Positive, 2005; TUC/CIPD, 2007; [www.ACAS.org.uk](http://www.ACAS.org.uk)).

Across the stages of the employment relationship, recommended practices include:

- Monitoring applications and current employee profile according to age.
- Modifying recruitment and other organisational literature to avoid ageist language, or language that implies a particular age such as 'in touch with the latest thinking'.
- Encouraging employers to review any compulsory retirement ages, their criteria for redundancy, etc, and ensuring employees understand their rights, for example, that they may ask permission to work beyond their retirement date.
- Reviewing recruitment, selection and promotion procedures and removing elements which unnecessarily exclude people on the basis of their age.
- Adjusting pay and benefits which are based on age.
- Implementing positive action initiatives such as advertising in media which attracts an under-represented age group.
- Providing robust appraisal or development systems to make the most of older workers' skills and talents.
- Tackling issues around physical and mental capacity, and the requirements for a job role in a realistic way, whilst not making assumptions about ageing workers.
- Raising awareness about age discrimination (through training, internal policies, etc).
- Ensuring managers and employees are aware of their responsibilities in respect of protecting older workers from harassment.

Nationally, organisations have adopted many of these policies to facilitate recruitment and retention of older employees, in response to legislative requirements and the 'business case' for age diversity (Employers Forum on Age, 2008). There are conflicting views, however, as to how widespread the changes are. Some research, such as that produced by the Confederation of British Industry (CBI), shows their membership granting almost three-quarters of requests for postponement of

retirement thus finding clear evidence of good practice around retirement and work flexibility. Others find that such developments in practice were much more limited (CBI, 2007; Equal Opportunities Review, 2007b).

Published case studies show us some examples of SMEs in the West Midlands which have benefited from their policy of recruiting across a broad age spread and introducing flexible working practices and flexible retirement options. These include reducing hours in recognition of changing priorities or commitments; moving staff to a less demanding role; or allowing them to retire and return to work on a reduced basis (perhaps joining a 'staff bank' scheme where they are called upon to work occasionally to alleviate skills/labour shortages). Benefits identified by these organisations include lower turnover, and retention of key skills ([www.agepositive.gov.uk](http://www.agepositive.gov.uk); Equal Opportunities Review, 2007, 2007a).

Further good practice has been identified in the West Midlands by the 'Coming of Age Partnership' which engages with employers and communities to improve employment opportunities, encouraging good practice via a 'Knowledge Network' and an 'Age Audit Tool' for employers (developed in conjunction with the Advisory, Conciliation and Arbitration Service - ACAS) ([www.ACAS.org.uk](http://www.ACAS.org.uk)).

#### **4.5.2 Barriers and Incentives to Employment**

There is widespread recognition of the need to train older workers as a way of addressing demographic change and resulting skills deficits (Labour Research, 2008). However, a number of barriers, either 'external' or 'personal', have been identified, by both national and regional studies, which affect older people wanting to work and earn (O'Neill and Welsh, 2006). The National Audit Office (2004) report – Welfare to Work – identified a similar set of barriers. External barriers might include age discrimination (especially by employers), lack of retraining opportunities, and reluctance on the part of employers to train older people, benefit disincentives and local labour market conditions (Mitton and Hull, *ibid*). Personal barriers might include family and caring responsibilities, a lack of awareness and a lack of recent or relevant work experience. Older people in rural areas have been found to be reluctant to travel outside local areas (Newton et al, 2005). Research by both McNair and Flynn (2005) and O'Neill and Welsh (*ibid*) identified that work-life balance is a preoccupation with the 50+ age group, whereby they are more concerned than other age groups with spending time with family, dealing with the geographical dispersion of family and friends, handling the emotional demands of common life events and realising long-term dreams. ACAS also identifies a number of external barriers put in place by employers, including advertisements which focus on younger people and selection procedures that reinforce stereotypes about older workers not being able to learn new skills ([www.ACAS.org.uk](http://www.ACAS.org.uk)).

Balanced against this, older workers' incentives to work include 'reasonable' wages, convenient locations which are accessible by public transport and a 'sense of purpose' (O'Neill and Welsh, *ibid*). Care must be taken, though, when considering the needs of the age group, and their differing motivations. It has been identified, for example, that women (possibly where they are the second wage earner in their household) and older people from Manufacturing and Construction sectors are more likely to take advantage of training opportunities to change direction.

Research by Phillipson and Smith (2005) has identified the barriers and incentives in play as 'push' and 'pull' factors which affect older workers, and may combine to have a strong influence. Poor health and disability, for example are common in 'pushing'

people out of the labour market, and those living in deprived areas are more likely to have their health and aspirations eroded by poverty (Mitton and Hull, *ibid*), although the need for financial security might 'pull' a number of them in (O'Neill and Welsh, *ibid*). Some of these issues need not be insurmountable. Studies conducted by The Centre for Research into the Older Workforce (part of NIACE) (CROW, 2005; McNair and Flynn, 2005), for example, found that skills shortages arose simply because some older workers' skills development needs had not been recognised because training was not raised as part of an appraisal system. To help overcome such negative factors, the CBI, Trades Union Congress (TUC) and Chartered Institute for Personnel and Development (CIPD) advocate workplace training, staff consultation and flexible retirement policies as key in maximising the benefits older workers can bring to the workplace (CBI 2002; TUC/CIPD, 2007).

### **4.5.3 Employer Attitudes**

Developing existing or new skills is shown to help employers retain employees, benefiting both parties (Mitton and Hull, *ibid*). However, employers in general continue to discriminate against older workers, assuming that they are less flexible or hard working than their younger colleagues. The Age Concern study provided further evidence of a gap between employer attitudes and behaviour, showing employers to be enthusiastic about employing older workers but little evidence that this resulted in employment for this group (O'Neill and Welsh, *ibid*). These underlying attitudes have a 'knock-on' effect, for example, where older employees have been shown as reluctant to approach their employers about their learning needs, 'for fear that their skills and qualifications deficits might be exposed' (Mitton and Hull: 544).

ACAS urges employers to challenge existing stereotypes about older people in the workplace, for example, questioning received ideas that they are more likely to take sick leave (which research has shown to be untrue), or that they all wish to 'wind down' as they approach normal retirement age ([www.ACAS.org.uk](http://www.ACAS.org.uk)). TAEN (2006) maintains, however, that such stereotypes are ingrained, and that it takes decades to change such attitudes, citing the ideas that: older workers cost more to employ; suffer from a decline in cognitive capacity; have more accidents; and find it harder to learn new skills, as common misconceptions. Indeed, recent research by the Employers Forum on Age has shown that despite legislation ageism remains deeply entrenched in the workplace ([www.efa.org.uk](http://www.efa.org.uk)). Other research, conducted by Jobcentre Plus, and the Coming of Age Partnership in the West Midlands has painted a more positive picture of the attitudes of employers towards the employment of older people. This is particularly true of smaller employers, with Manufacturing organisations also recognising the importance of the skills and experience within this group (McNair, Flynn and Dutton, *ibid*; EEF, 2008).

### **4.5.4 Financial Provision**

Financial considerations are shown to be a key factor when making decisions about retirement or continuing to work. The pension system provides both 'incentives' and 'disincentives' to work, with secure occupational schemes, for example, providing an incentive for earlier retirement for higher class social groups. Loss of benefits, on the other hand, acts as a financial disincentive (O'Neill and Welsh, *ibid*). Financial considerations may well be more relevant for some groups of women, due to gender inequalities in retirement income, which disproportionately affect divorced and widowed women (ESRC, 2003; Phillipson and Smith, *ibid*; Cappellari, Dorsett and Haile, 2005; DWP, 2005), and both genders have been disadvantaged by low levels

of state pension and underperforming occupational pensions (Moss, 2008). Improvements in provision of flexible and phased retirement options may be confined to more advantaged workers, in particular men, who have accumulated savings and pension entitlements. For those with health problems, it has been found that early retirement is often enforced, and flexible or part-time roles are often poor quality and lower paid (Lissenburgh and Smeaton, 2003).

Although there are the 'affluent, early-retired' (Smallwood and Obiamiwe, *ibid*), this group still sits against a backdrop of fewer people saving adequately for retirement for the future, with women, those with low skills, those with health issues and the self-employed historically making the least provision (Boyes and McCormick, 2005; TAEN, 2006a).

#### **4.5.5 Alternative Working Patterns**

Several reports (McNair and Flynn, 2004; HSBC, 2005) identified that people working after age 50 commonly wish to continue in work if that work can be 'flexible', which might include part-time working, flexitime, job rotation, annualised hours or self-regulation of pace (Vickerstaff, 2006; TAEN, 2007).

Self-employment is increasingly viewed as an attractive option, with numbers of over 50s – known as 'olderpreneurs' – growing across the UK. In 2004, for example, 19% of this group were self-employed, compared with 14% of people aged 25-49, with the Department for Work and Pensions (DWP) finding more recently that the percentage of self-employed people increases with age (ONS, 2005; DWP, 2006 and 2006a; Director Magazine, 2007). The Government views self-employment as one way of extending working lives, with initiatives such as PRIME established to provide specific support to people who are 50+ and setting up in business. There is widespread recognition that older people are more likely to have the necessary economic experience and skills seen as key for small-business ownership (Curran and Blackburn, 2001; Kautonen, Down and South, 2008; DWP, 2006), and the trend in the West Midlands is for self-employment (across all ages) to be on the increase (ONS, 2008). Self-employment is seen as a less attractive option for some, though, due mainly to the lack of guaranteed income combined with stress, long hours, and a lack of ideas about how to best use existing skills (Curran and Blackburn, *ibid*).

Financial concerns are only one reason some older workers wish to carry on working into their later years, with the benefits of developing themselves and the enjoyment of work and a desire for independence also being seen as important. Many wish to continue to be economically active, even if they don't want to return to previous occupations or work styles (Department for Education and Skills, 2003; 2007; Curran and Blackburn, *ibid*).

### **4.6 Training and Qualifications**

Age Concern found unemployed older people to have low levels of training and qualifications, even where they had been in work throughout their lives. This, combined with the finding that people with formal qualifications are those likely to remain in work after they reach their mid-50s, highlights the importance of training in keeping this group in the workforce. The DWP (Age Positive, 2007) and the CBI (2002) maintain that access to, and take-up of, training is a key factor in encouraging greater employability and workplace participation among older workers. Research by CROW, which shows participation in job-related training and education declines with

age is, therefore, discouraging (McNair et al, 2004). Furthermore, the number of publicly funded schemes for the over 60s has dropped considerably, due to changes in policy which mean that courses will only be funded if linked to a qualification (Personnel Today, 2007), although significant investment has been made through the 'Train to Gain' initiative (LSC, 2007).

The TUC has argued that older workers should be encouraged to take up apprenticeships ([www.equal-works.com](http://www.equal-works.com)), and ACAS (along with others) promotes the idea of using older workers as mentors for junior colleagues (NIACE, 2004; [www.agepositive.gov.uk](http://www.agepositive.gov.uk)). A further suggestion is that stronger lines are forged between employers and organisations offering lifelong learning opportunities.

#### **4.6.1 Barriers and Incentives to Training**

In the same way that they face barriers to employment, older people wishing to train face a number of barriers including cost, low confidence, perceptions of discrimination and lack of knowledge about learning opportunities and the financial implications. In addition, it has been found that they are less likely to be interested in learning new skills when they do not perceive these will affect their employment prospects, with some research identifying that men are more reluctant to start courses after 50, particularly following redundancy (Newton et al, 2005a; Newton, 2006). Lack of aspiration, too, has been identified in those with fewer qualifications (Mitton and Hull, *ibid*; Department for Education and Skills, *ibid*), with research showing that negative stereotypes can feed in to older people's self-perceptions so that they lack confidence in their own abilities (Jennings and Darwin, 2003). Caring responsibilities are also an important consideration; with the 'peak age' for caring being 50-59 in the UK with more than 20 per cent of people aged 50-59 providing some unpaid care (Carers UK, 2005). Finally, the amount of travel required is a factor, particularly in rural areas (Newton et al, 2005).

#### **4.7 Information, Advice and Guidance (IAG)**

The role of high-quality IAG in helping older adults overcome barriers to work and training cannot be underestimated, and some of the significant research around provision for the over-50s is in this area. The Centre for Guidance Studies (2005) identified the importance of career and life guidance in any strategies aimed at unlocking older people's potential, and highlighted this as an important method for reaching out to 'hidden unemployed', such as those who have retired, and would like to work but either lack confidence or fail to recognise opportunities. The Government has, in fact, designated this retired group as a priority through the provision of IAG Partnerships, in an attempt to overcome the common assumption that IAG services are for younger people (Ford et al, undated; Department for Education and Skills, *ibid*; Mitton and Hull, *ibid*).

Some of the key IAG requirements from older people have been identified as detailed, relevant information which relates to their age group; adviser and peer group support for motivation; and encouragement to help overcome lost confidence and self-esteem, and to extend networks. Of particular importance is that older age groups have had difficulty identifying support agencies with staff who are experienced with, can listen to and empathise with and provide practical help which meets their specific needs. The Leitch Report on skills (*ibid*) further identifies advice and guidance to adults as a key step in moving forward to dealing with skills gaps.

### **4.7.1 Additional Support Requirements**

In addition to IAG, a range of support has been identified as useful in helping older people with training and reintroduction to the workplace. Opportunities, policies and initiatives need to be better publicized to this group, and the potential and image of Jobcentres should be addressed to overcome the stigmatising effect of these. Age Concern found that women and people from minority ethnic groups in particular were reluctant to visit Jobcentres. The Department for Education and Skills (ibid) expressed concern about the clarity of guidelines which limit the advice given to job seekers not on benefits.

TAEN also expresses concern about older people with disabilities, citing the lack of services aimed at them and the fact that their employment rate has trailed behind other groups. They point out the relevance of targeted services to older workers, as half of people on incapacity benefit are over 50 (2007a). Mitton and Hull add to this, urging that the heterogeneous needs of the group are considered, such as access to self-help for those in rural areas.

Age Concern's research had identified a need for employers to consider where older people seek information about employment, including newspapers and the internet. The use of technology, for example, has proven very successful with initiatives like the (now closed) Tick-Tock project, which concentrated on improving the employability of older workers in the South East through encouraging and facilitating lifelong learning via e-guidance ([www.equal-works.com](http://www.equal-works.com)). There has also been recognition of a need to develop these skills in the West Midlands, for example, in the 'Wired up to Well-being' scheme which provides IT sessions to people over 50 in the Birmingham area (Birmingham City Council, 2007).

As recommended by the Chartered Institute for Personnel and Development (CIPD), which has produced a number of research reports in this area, allowing for people to work for longer 'has to meet the needs of the individual and the business' (People Management, 2008). Retirement, some pensions economists have argued, should evolve into a period after full-time work where people remain economically active, but choose to work on their own terms (Moss, 2008). A full range of support services is needed to facilitate this.

## 5 SECONDARY DATA OVERVIEW

The following section is a summary of the key findings from our analysis of a wide range of secondary data sources. Full interpretive discussion, supported by tables of data, is presented in Appendix 1.

### 5.1 Demographics

The latest mid-year population estimates (2006) show that there are more than 5 million people resident in the West Midlands (5,366,600).

The total population of the 'older workforce' age band of 50-64 years is close to 1 million (971,700): 50-54 years (325,800); 55-59 (346,400); and 60-64 years (299,500). There is nothing to stop individuals continuing to work beyond 65 years of age.

The 'retirement' population in the West Midlands is distributed as follows: 65-69 years (247,500), 70-74 years (211,500); 75-80 years (177,600); and 80 years plus (238,900).

Population projections for the West Midlands estimate that the total population of the region will increase by 337,100 between 2007 and 2018: a 6.3% increase. Over the same period, the 'older workforce' is projected to increase by 83,200: a percentage increase of 8.5%.

The West Midlands has around 4 million residents of 'working age' (age 16 and above): of these 87.8% are recorded as White; 7% as Asian; 2.7% Black; 2.0% as an Other Ethnic Group; and 0.6% as Mixed Ethnicity. However, the ethnic profile of the population varies considerably between sub-regions.

Census 2001 showed that 14.8% of the region's working age population (16 to 64 years) reported having a limiting long-term illness. Within the older workforce, the limiting long-term illness rate was substantially higher, at 27.2%.

Self-reported education levels for the region in Census 2001 show that while 29.3% of the working age population have no formal qualifications, half (49.9%) of 55-59 year olds and three fifths (59.2%) of 60-64 years olds reported having no qualifications.

### 5.2 Economic Activity

Economic activity rates for the older workforce and the regional workforce as a whole are similar (74.8% and 77.1% respectively). Within the older workforce, self-employment rates are slightly higher than for the working age population as a whole (11.8% compared with 8.3%) and unemployment is slightly lower (2.8% compared with 4.7%).

## 5.3 Employment of Older Workers

There are more than 2 million people of working age in the West Midlands who are in paid employment: including 695,500 aged 50 years and above. Half (47.5%) of those older workers are male full-time workers; a fifth (20.7%) female full-time workers; 8.7% male part-time workers; and 23.0% female part-time workers.

Census 2001 recorded more than half a million (565,795) workers in the West Midlands within the older workforce (50-64 age bands). The largest proportion of workers in the 50-54 and 55-59 age brackets were employed in Managerial and Senior Official occupations: 16% and 14.8% respectively. The largest proportion (17.2%) of workers aged 60-64 were employed in Skilled Trades occupations.

The Public Administration, Education and Health sector employs the greatest proportion of people aged 50 and over (30.6%), a slightly higher proportion than for the workforce as a whole (26.7%).

The Annual Survey of Hours and Earnings shows that the gross median hourly pay for employees in England is £10.37 and in the West Midlands it is £9.64. Gross hourly pay increases with age. Median hourly pay peaks for workers aged 30-39 years (£11.97) and then decreases for workers aged 40 and above: 40-49 years (£11.56); 50-59 years (£10.75); and 60 years and above (£8.95).

## 5.4 Training, Learning and Qualifications

The National Learner Satisfaction Survey (NLSS) 2007 shows that in the West Midlands, part-time learning is the most popular type of learning for all learners aged 21 and over: accounting for at least 90% of older learners.

Courses in Information and Communication Technology (ICT) are the most popular courses for learners of all ages: accounting for a fifth (18.0%) of learners aged 16 years and over. For older learners, the proportions are higher: 41-50 years (19.3%); 51-60 years (24.1%); 61-70 years (27.5%); and 71-80 years (39.2%).

The LSC's Individualised Learner Records (ILR) 2007/08 shows that there are a total of 50,855 learners in the West Midlands aged between 50 and 84 years: 24,450 in Further Education (FE); 175 in Work Based Learning (WBL); 7,441 on Train to Gain (TTG) courses; 10,434 on Personal and Community Development Learning (PCDL) courses; and 8,355 on European Social Fund (ESF) courses.

Two fifths (39.9%) of learners aged 50 and over in the West Midlands are men, and three fifths (60.1%) are women. The ethnic profile of older learners (50+) learners in the region is White (85.7%); Asian and Asian British (5.8%); Black and Black British (3.6%); Not Known (0.9%); Other Ethnic Group (0.9%); and Mixed Ethnicity (0.5%).

The National Employer Skills Survey (NESS) 2007 shows that the total expenditure by employers in England on training is over £38 million: equivalent to £1,736 per employee. Employer training expenditure in the West Midlands exceeds £3 million, or an average of £1,575 per employee. Average 'spend per trainee' for both on-the-job and off-the-job training in the West Midlands is lower than the national average.

## 5.5 Skills Gaps and Changes in Sectors & Occupations

The Annual Business Inquiry shows how industrial sectors in the West Midlands have expanded or declined from 2002 to 2006. Sectors that have seen an increase in the number of business units in the region over this period are: Banking, Finance and Insurance (up by 24.8%); Public Administration, Education and Health (up by 14.5%); Construction industry (up by 14.5%); Distribution, Hotels and Restaurants (up by 1.7%). Sectors in the region that have seen a decline in the number of business units between 2002 and 2006 are: Energy and Water (down 16.1%); and Manufacturing (down 10%).

The current occupational profile of the workforce in the region is as follows: managers and senior officials (14.4%); associate professional and technical (12.8%); elementary occupations (12.2%); professional occupations (12.2%); skilled trades (11.9%); administrative and secretarial (11.7%); process plant and machine operatives (8.9%); personal service (8.1%); and sales and customer service (7.5%).

Figures comparing the skills shortages for England with those of the West Midlands show very similar patterns. Half (51%) of employers in England have reported a lack of technical and practical skills, as have three fifths (58%) of employers in the West Midlands. Employers in the West Midlands are most likely to be lacking in the following skills: customer handling skills (33%); team working (32%); oral communication (31%); problem solving skills (28%); written communication (21%); management skills (20%); and general IT user skills (19%).

## 6 INCENTIVES AND BARRIERS TO EMPLOYMENT

Older workers expressed a variety of incentives and motivations to employment and an even wider variety of barriers to employment or career development. Phillipson and Smith's (2005) 'push' and 'pull' factors were evident here, with some participants' health, caring and other issues 'pushing' them out of employment, while other participants' need for financial security was 'pulling' them into employment, see Section 4 – Literature and Policy Review.

### 6.1 Attitudes to Employment

Attitudes to, and motivations for, employment varied most between those who were in work and those who were not. For this research, gender, ethnicity and location did not seem to be contributory factors to older workers' motivations to find work or develop their careers.

#### 6.1.1 Attitudes to Employment of the Economically Inactive

For older people not in employment, there were discernibly different attitudes between those who were retired and those who were unemployed due to redundancy. Most unemployed people taking part in the research were still actively seeking work, but clearly discouraged by their lack of success in finding it. The less affluent, workless group in Smethwick was most ready to list barriers to their gaining employment, and least hopeful of finding it. The more affluent workless group in Shrewsbury was generally more flexible in their approach to employment (many of them having had a variety of jobs) but were also more ready to list barriers than incentives to employment. However, retired participants across the region were much more ready to have positive attitudes to work, some of them being involved in voluntary work, and others considering returning to work on a part-time basis.

While not always saying why they wanted to return to work (although money was clearly a major factor), the Smethwick workless group all agreed that they would like to work longer, assuming they could be in a job, until 70. Their perception was that employers were judging them by their age and making the assumption that they would retire at a certain age (and therefore have a short working life). One of the Smethwick group who had retired due to ill-health, stated:

*"I'd love to go back to work."*  
Female, Retired due to Ill-health

Among those who had retired through choice, there was a much more positive attitude to gaining future employment, tempered with an understanding that the economic situation might make this tricky. The Afro-Caribbean group in Birmingham were especially positive in their attitudes to gaining work:

*"Personally, I don't think anything would stop me. I think I would go for it. If I had to find work, I would, if I could get it, because it's hard these days cos there's a lot of people being made redundant..."*  
Female Afro-Caribbean, Retired

Other people who had retired were engaged in voluntary work, which they clearly found rewarding:

*“I’m very happy in my role. Happier now, I do actually do voluntary work for Macmillan. I feel more useful now than when I was at work.”*

Female, Retired

### **6.1.2 Attitudes to Employment of Older People in Work**

Generally the attitudes to employment of older people in work were more positive than those of the unemployed. However, this positivity was tempered by comments about the modern world of work, in which stress and paperwork seem to abound (see *Barriers* section below), especially in professional roles, and in which some participants were aware that their jobs were not stable.

*“I feel that I’m winding up with my speech and language work... It’s very intense and I enjoy it.”*

Female, Teaching Assistant

*“The job is starting to deteriorate a little bit now it’s not as stable.”*

Male, Engineer

*“I’ve got no complaints from my job, I live for it. I’ve got total satisfaction. The only problem I have, as I say, it’s a small company...and we are against time and cost of installation and we have to do things to a minimum, due to profit margins, as it’s such a cut throat world.”*

Male, Dairy Engineer

Employed participants in Coventry and Warwickshire agreed that there were generally more advantages in working for a large organisation, including:

- More structure in progression routes.
- Better policy, including flexible working and job share.
- More age positive.

The consensus of the Birmingham group of participants employed by larger companies was that big companies can offer more to people and look after them better. However, one participant in Coventry and Warwickshire saw managers in smaller companies as being more friendly and approachable.

Many participants from organisations of all sizes complained about stress, being busy, and targets in work (see *Barriers* section below). One female who had been an office manager and worked in accounts, had taken a deliberate decision to take a less stressful job, and was clearly enjoying the change:

*“I decided to give that a break and have a change, to make sandwiches for a change. The first job ever that I’ve been able to walk into in the morning, do the job, enjoy every minute of it, and walk out without taking any stress home.”*

Female, Sandwich Maker

While older workers are aware of some of the strains and stresses of being in work, none of them expressed a strong desire to be without work, and several were clear about the enjoyment that work brings. See the *Motivations for Employment* section below.

### 6.1.3 Motivations for Employment

The main motivation underpinning participants' requirement for work was the need for money or financial security. However, a number of other motivations for work were expressed by participants, both employed and unemployed, including:

- avoiding boredom;
- socialising;
- a sense of purpose;
- progression;
- suitable hours; and
- stress reduction (for some less demanding jobs).

Some of the factors above (e.g. hours and stress reduction) reiterate the preoccupations of the 50+ age group identified by O'Neill and Welsh's research, on behalf of Age Concern (2006) (see Section 4 – Literature and Policy Review). Expressions of enjoyment of work were given mainly by people who felt fulfilled by the social aspect of work:

*“Being out there meeting the people, getting out, because I’m a rural postman. I’m my own boss, I can choose if I want to go fast I’ll go fast and if I want to go slow I’ll go slow. Basically I meet lots of interesting people...”*

Male, Postman

*“I helped out at the hairdresser’s a bit, shampooing and stuff. That was nice, chatting to people. It was the ‘craic’, being with women and talking...”*

Female, Early retiree in Part-time Work

*“I think personally, for our age group, work is quite a social thing and you do it for as long as you’re happy and if you’re not happy you pack it in and go somewhere else.”*

Male, Surveyor

While money is a background factor underpinning many older people's incentives for work, other factors are also at play in motivating older people to work. Given current demographic trends, employers who wish to target the older workforce as an important source of labour, should be taking into consideration these other motivations as they seek to attract older workers. These motivations include work-life balance; factors such as progression and a sense of purpose; and the social aspects of work.

## 6.2 Future Employment Aspirations

Older worker participants generally discussed barriers to their career development more than their future employment aspirations. This may be because in the context of this research, participants were more concerned about putting forward issues that in their opinion require changes in regional policy and practice. It may also be that the majority of participants had few aspirations for the future. Some just wanted to remain where they were, or were preparing for retirement. Some were seeking more flexible working patterns (see Section 9 – Alternative Working Patterns and Self-employment). One participant had given up her most recent job due to a combined lack of enjoyment and wanting to work part-time.

Older people in employment had a wide variety of aspirations, mainly down to the personality and life circumstances of individuals, including:

- Changing to a new career (from physically demanding work to office work).
- Returning to a previous expertise (in horticulture).
- Retraining (to move into a new career).
- Moving roles within a large organisation.
- Continuing on a progression route within a large organisation.
- Winding down to retirement.

Age, as well as opportunity (generally with large organisations) and personality, could be a factor in the aspiration to progress in a career. Two female participants talking about career progression were in professional roles with large organisations and were both in their forties:

*“With the NHS, it is such a big employer that there are all these jobs available. At the moment I’m happy with what I’m doing but in two or three years I may think about something, still within the Trust, but another job. I think with the NHS they run a policy of Lifelong Learning and they actively encourage you when you want to do something.”*

Female, Under 50, IT Manager at Hospital

*“Progression, I’m looking for progression. I’m a manager and programme management is the next level. I’m on a progression route at the moment. I’ll move up when someone in the position at the moment retires. I’ve just taken the role on so it will be a two year progression.”*

Female, Under 50, Manager for Large Manufacturer

Conversely, an older male employee was just looking to wind down:

*“At my age you have to be [going] to work for 2 years and get out of it - I’m winding down. My career has been, I’m not looking to get a promoted. I’m still doing the right thing, doing my work, but I’m steadily winding down. I will work full-time till I stop then it will be a total change of lifestyle.”*

Male, Over 50, Product Manager

In line with the findings of Newton (2005), more female than male participants seemed to be open to retraining as a route to a new career. One female was going back to college to train to teach adults, and another had taken a qualification to work as a medical secretary once she was freed up from childcare responsibilities. Other women also spoke about training as a route into work. This contrasts with the rather wistful male who saw himself as unable to change career because of his lack of basic skills:

*“I’m not a good scholar and I think that that has held me back, if I could have spelt better I could have gone further... I was fairly illiterate really – I used to find writing cheques hard, I’ve got better over time obviously. I would have liked to have been in the office if I could by now because I’m 53 and the jobs are still quite physical, but I can’t do that.”*

Male, Engineering

Very few participants who were unemployed outlined any future employment aspirations. In line with the findings of Mitton and Hull (2006), (see Section 4 – Literature and Policy Review), participants from a less affluent background (in

Smethwick) seemed to have had their aspirations and hope eroded by poverty. This group focussed especially on barriers to gaining work rather than on future employment prospects: they had given up. The more affluent workless group (in Shrewsbury) mainly consisted of women returners, most of whom were more hopeful about returning to work, though aware of the barriers they faced. One of them had done training to help her to become a receptionist, although she had not found the training very helpful.

Overall, participants currently in employment expressed more career aspirations than those without work; and younger participants expressed more ambition to progress than older participants. Women also seemed to be more open to retraining as a means of developing their career.

## **6.3 Barriers to Career Development**

Older workers perceived a wide variety of barriers towards gaining work or developing careers. Consistent with previous research (see Section 4 – Literature and Policy Review), workers outlined both external and personal barriers to employment (National Audit Office, 2004; O'Neill and Welsh, 2006). External barriers mentioned included discrimination (especially by employers) on grounds of age, gender and ethnicity and reluctance by employers to train older workers. Personal barriers included family and caring responsibilities and personal attitudes towards both employment and training.

### ***6.3.1 Attitudes among the Older Workforce***

Throughout the research, attitudes of some older people proved to be a barrier in themselves to employment and career development. Some older workers were choosing to wind down; many complained about the change they had seen over the years, both in terms of employment ethos and industrial change. Others seemed especially threatened by younger workers, generally expressing opinions that these younger people would be hired by employers because they were cheaper, even though older workers perceived them not to be 'up to the job'. There were similar opinions about foreign workers.

People who are out of work face specific issues both financially and in terms of the effect unemployment has on their attitudes and beliefs. Many of the barriers raised by the economically inactive in the course of this research related to their fear and suspicion that they were being prevented by external forces (such as employers or industrial change) from getting the work they craved. While this may be the case, it is also the case that, having been worn down by difficult life circumstances and financial instability, they had also moved towards negative attitudes that were themselves a barrier to employment. Being removed from employment also enabled their views to become entrenched without new external evidence from the world of work from which they felt excluded.

Attitudinal barriers expressed by older workers, and especially the economically inactive, included:

- lack of confidence;
- the 'benefits trap' (meaning they would be worse off working than staying on benefits);
- attitudes to towards training;

- attitudes towards IT; and
- attitudes towards change.

These barriers and other 'external' barriers are covered in the sections that follow.

A solution to the attitudinal barriers amongst older people, and especially the unemployed would be the provision of better careers information, advice and guidance and tailored specialist support for older workers, especially from Jobcentre Plus or via voluntary sector agencies with advice provided by older people (see Section 12). The LSC and its partners could identify and support appropriate voluntary sector projects offering targeted support to people over-50 back into work or self-employment, especially those in the most deprived areas.

### **6.3.2 Attitudes Towards Training**

Some participants, especially females from more affluent backgrounds, understood that retraining for a new career was one route to career development or into work. However, other participants, both in and out of work, had a less positive take on training. Some talked about it becoming harder to remember and take things on board with age.

Participants from a variety of backgrounds (different ethnic groups and genders) commented on paperwork, and the need for qualifications, being a barrier to gaining work, or moving into a new field. They seemed bewildered that the amount of experience they had gained in previous roles did not seem as important as qualifications to employers. They believed that the balance of experience and life skills versus qualifications for interviews should be altered by employers for older workers:

*"I've spoken to a lot of people, and the expression 'qualified by experience' is starting to come out. It's not all jobs, some jobs, but sometimes they'll try to exclude people who haven't got these qualifications. Experience should count for more than qualifications. It's your ability to do the job."*

Male Asian, Retired

One female factory worker was interested in changing career to be a care assistant, but said that she did not have time to study part-time as well as working full-time. However, feedback from some employer respondents in the Health and Social Care sector seems to indicate that she could have been trained on the job. Once again, good support and IAG could have helped this participant with a change in career from a declining sector into a growth sector.

### **6.3.3 Attitudes towards IT**

Attitudes towards IT, especially amongst the unemployed, were a barrier to their gaining employment or moving to new careers. Participants varied between the slightly apologetic and the aggressive in their attitudes to computers and technology:

*"I did IT with work – I just felt embarrassed, I couldn't keep up. You think "oh, gosh, is this for me". You do slow down as you get older."*

Female, Unemployed

*“I’ve run a foundry, a dress-shop, a garden centre. I’ve tried many things. My personal experience would be almost invaluable to some people. But I’m unemployable, I can’t work a computer and so whatever knowledge I have, whether mechanical or theoretical or financial or whatever is absolutely useless...”*

Male, Retired due to Ill-health

Not all participants had negative attitudes to IT, and some were clearly using computers as part of their job. However, it was the unemployed who specifically felt that they had been left behind and that they were living in a world of computers that they did not understand. This issue has implications for the sort of support that unemployed older people require. A lot of information and advice is now online – but older workers, and especially those older workers most in need, may not be able to access it. One participant was clearly alienated by a Jobcentre increasingly reliant on technology:

*“... I did look in the Jobcentre but it’s all computers.”*

Female, Retired due to Ill-health

For unemployed people aged over 50, information and advice needs to be available from sources additional to online sources (such as phone helplines or face-to-face IAG), as some are unlikely to be able to access technology-based information.

In addition, the belief that IT is all-pervasive is perhaps another method of enabling some of the unemployed to feel better about not re-entering the labour market. A lack of confidence in returning to the fray of the open job market and changing world of work might engender a feeling of helplessness which requires additional ‘proof’ and barriers to returning, making the route back impossible. In this way, the person can avoid confronting the lack of confidence in the belief that the barriers and hurdles are insurmountable.

### **6.3.4 Economy/Industrial Change**

The effects of the changing economy and industrial restructuring were spontaneously mentioned by participants from the Black Country and Birmingham. The current ‘credit crunch’ (Autumn 2008) was mentioned by two participants, with reference to the fact that they thought this downturn would affect those in the 50+ age range more than others:

*“With this recession kicking in now, they reckon there’s gonna be even thousands more people out of work. So what chances have you got of getting a job at 57 and 58?”*

Male, Unemployed

Several participants talked about employers looking for cheaper labour (either younger people or foreign workers) or outsourcing in order to keep costs down. However, it was the loss of Manufacturing in urban areas that was most mourned by participants from the Black Country and Birmingham:

*“...this was the backbone; the Black Country, where we used to produce castings for all over the world. Now we’ve got nothing. Every bit of it’s abroad... The industries have moved to other countries: China, India, Czechoslovakia. Everywhere.”*

Male, Unemployed

*“The world has changed so vastly. I think others here would mostly say that 80% of the jobs were productive jobs, where you make something. Producing things, it’s gone the other way.”*

Male Asian, Retired

Clearly, retraining and moving to work in other sectors would be solutions for older people seeking employment or career development. However, some participants found it difficult to recognise that they needed to change in order to react to the external changes around them.

*“Plenty of McDonald’s! If you want to go and work in McDonald’s. The young un’s do, but a 57 year-old bloke don’t want to go and work in McDonald’s. “*

Male, Unemployed

Males in particular find the thought of transition from the traditional (mostly male-dominated) Manufacturing and Engineering jobs with their status, and relatively high pay including shift bonuses, to Service sector jobs, particularly hard. In some cases this may be because these workers have not had to think about the ‘softer’ skills that they possess, such as communication skills, teamwork and so on. Consequently, they may not feel confident in their ability to enter the sector. For others, the move into what are perceived as more ‘female’ sectors and the lower pay do not appeal.

### **6.3.5 Transport and Locational Issues**

Very few transport and locational issues were raised by older workers, and there was little difference between rural and urban feedback, mainly pointing out difficulties with public transport. One Afro-Caribbean participant from Birmingham related how she was made redundant when her company relocated and there was no bus route to the new location. Younger people who could drive could still get to work. Feedback from one small employer running a care home in the Black Country also confirmed that bus routes can be a determining factor relating to recruitment – she complained that this affected her ability to recruit to the home. Meanwhile participants in Shropshire also complained about travel issues in rural areas, and the unreliability of public transport (see Section 11 – Training and Learning).

One locational issue raised by Afro-Caribbean participants related to what may be termed ‘postcode discrimination’. They believed that employers judge applicants by the area they come from:

*“I think that say you are in Handsworth, for example, then your chances are very very slim... But I do know people who are from Handsworth and once you put Handsworth on your form that you fill in you don’t get an answer sometimes. And my nephew, for example, he filled in a form, filled in all his qualifications and everything, and once he got there and they saw that he was black, he didn’t get the job. And he had all the qualifications, so it does have a bearing – colour and where you live.”*

Female Afro-Caribbean, Retired

Like all other forms of discrimination, this is hard to prove, but it is an interesting perception, nonetheless, that people from deprived areas may be suffering from employers’ attitudes to their postcode, in addition to other potential types of discrimination.

### **6.3.6 Employer Attitudes**

One of the external barriers to employment for older people can be perceived employer attitudes. Focus group participants were certainly concerned about the effect that employer attitudes might have on their ability to gain work and advancement. Areas of concern were:

- Employers not being willing to train older workers.
- Employers preferring to hire younger staff, especially in younger profile professions (see below).
- Employers being unwilling to recruit older workers, because they think they will not get enough years' work from them.
- An uncaring attitude on the part of employers towards their workforce generally.

For a comparison of the views of employer attitudes and the views of older workers about employers, see Section 7 – Employer Attitudes towards Older Workers.

### **6.3.7 Employment Ethos**

A variety of participants talked about the changes in ethos they had experienced over time. Once again, change in the workplace was not viewed positively by older workers. The modern world of work was seen as:

- More impersonal than in the past: Some participants from the Public sector talked about a reduction in rapport between themselves as professionals and their clients/customers.
- Target-driven: participants working in the Public sector or for large organisations such as banks, talked about the pressure they were under to meet targets.
- Stressful: participants from a variety of sectors and occupations, managerial and non-managerial, talked about stress in the workplace and its effects on themselves, and their families.

Overall, very few participants seemed to find their employment entirely pleasant and enjoyable. Some (presumably with fewer financial pressures) had deliberately changed job to something less stressful or part-time, such as dog-walking or sandwich-making. Most participants in stressful situations tended to see this as related to the attitudes of employers – taking on a 'Gradgrind' role, trying to get as much from their staff as they could, for as little as they could give in return. However, one participant saw the modern ethos as being more endemic and cultural:

*"...I don't think that it's the bosses push, I think it's a cultural thing where people want to get on and it's encouraged - you do it for your own kids – we say "you've got to get on, you've gotta do this, you've gotta do the other, you've gotta strive and do your SATS" and then you think "for god's sake you're 5." But that's when it starts and it's a cultural thing right from way back and I think we do it to ourselves – we do it to ourselves."*

Male, Sales Manager

### **6.3.8 Jobs with Younger Profiles**

One further barrier to employment can be the perception that certain jobs or sectors have a younger profile for their workforce. Perceptions are that some industries, such as ICT, have been found to be more inclined towards discrimination towards older workers – (Goodwin, 2006; www.brandrepublic.com, 2006) see Section 4 – Literature and Policy Review. Other sectors or occupations, such as Health and Social Care, or Construction may also be physically demanding, which can also be challenging for older workers.

Participants from a group in Staffordshire perceived the IT sector; the armed forces and the police to be ageist; while perceived non-ageist sectors/employers included B&Q (mentioned by participants from a number of groups as being an age positive employer) and supermarkets.

Other participants echoed these perceptions about younger profile jobs:

*“In the computer industry there definitely is [ageism].”*  
Male, Computer Engineer

*“In my trade definitely (building) I don’t think there’s anybody over 40. Unless you work for a company already...”*  
Male, Unemployed

One participant working in the Health and Social Care sector noted that workers were prone to bad backs. However, another retired participant, who had entered the care sector as a second career (presumably when she was already over 50) noted that she had only started to find the work too demanding as she approached retirement age:

*“And then I go into caring... It was with older people, and some of them have dementia and you know, it was hard work, but it was enjoyable. And then I think I was getting too tired for this. So I just went... it was too heavy. I couldn’t manage some of the patients anymore. I was beginning to become a patient myself [laughs].”*  
Female Afro-Caribbean, Retired from Caring (2nd Career)

### **6.3.9 Health/Caring Issues**

One of the personal barriers to employment for older people is health and caring issues. A number of participants, both male and female, mentioned health problems as a barrier to their getting further work. Generally those with health issues would have liked to continue in work, but were no longer able to work in ways they had before. Not all participants with health issues went into details about the nature of their health problems, and none of them indicated whether they were on incapacity benefits (most described themselves as retired), which may be because of the stigma attached to receiving benefits for health or disability issues. Health issues are known to affect a higher proportion of the older workforce (see Section 5 – Secondary Data Overview). Although, interestingly, older people in employment were perceived as more reliable and less likely to go off sick than younger workers by employers and older workers (see Section 7 – Employer Attitudes towards Older Workers).

Caring issues, although they can relate to men, are much more likely to be a barrier affecting women. No males reported caring, either for children, or for elderly relatives, as a barrier to employment. By contrast, many females spoke about their responsibilities, especially for child care, but also in caring for sick relatives. Several females reported specific issues in getting back into the world of work after caring, including:

- Typecasting (having experience of caring for children and relatives means that employers think you should go into care).
- Lack of confidence after a long time out of the workplace.
- Lack of time (one female Asian participant had to look after her disabled son all day).
- Too stressful to work in a management role alongside caring for a sick relative.

While health issues are a fairly intractable barrier to employment, the positive stance now being taken by Government towards incapacity benefit claimants should see more people getting back into work (assuming the economy can support this). For women returners, or those with caring responsibilities, once again good careers information, advice and guidance should help in identifying appropriate roles, with flexible hours suitable for people in this life situation.

### **6.3.10 Gender Discrimination**

Most issues relating to gender discrimination that arose during the research were about the barriers that women can face relating to employment. Unsurprisingly, the issues for women were mainly raised by females and included:

- caring issues faced by women (see above);
- lack of childcare and support with childcare costs;
- employers not wanting to hire women of childbearing age;
- wage disparity with male colleagues in equivalent roles;
- men being promoted, rather than women; and
- unsympathetic attitudes of employers towards women with families.

Typical comments from participants are below:

*“The bosses don’t seem to understand that when women are young with families we have more than one job, we have to multi-task. We have to run a house, look after children, do the shopping ... A lot of bosses are not geared to see that side. They see you as an employee, not a person. Some see you as nothing more than a number. “*

Female, Sandwich Maker

*“Society is geared towards a male society. Because we’ve been in that situation for so long there are so many routines which are traditionally women’s routines which is raising children, cleaning and all that sort of thing and the man is normally out at work. If both parties want to work then something’s got to change to get those jobs done.”*

Male, Retired

While most employer respondents stated that they were not discriminatory in any way, older worker participants were clearly less sure that this is the case.

Clearly, gender inequality affects old and young. For older workers in particular, women seem in some ways to be more flexible and eager to enter the changing workplace, but also may have more reason to do so (less pension provision). While women still seem to be taking on the large proportion of caring and home-making responsibilities, equality in the workplace, including equal pay, may not be achievable. This may affect older women increasingly in the future as they take on the dual burdens of childcare and caring for older relatives. Meanwhile for males coming out of traditional industries, moving into the Service sector can prove difficult.

### **6.3.11 Race Discrimination**

Most comments about race discrimination as a barrier to employment or career development came from participants from minority ethnic backgrounds. One male Afro-Caribbean participant talked about his ambition to have a career in electronics, which was thwarted by attitudes when he first came to Britain. Though retired, he still hankered after the career he would have liked to have had:

*“...if that door’s open I’d be running through it right now... I still haven’t given that up – I went for four years to the night school...”*

Male Afro-Caribbean, Retired

An Afro-Caribbean female thought that there was a cultural issue for black males:

*“I think most black women fare better than black men... Some black males can be a bit aggressive and big-headed in the way they talk – and they scare their employers. They might not mean it, but that’s how they present..... The first people to go are young black males. Everytime.”*

Female Afro-Caribbean, Retired

Asian participants also believed that they might face discrimination, discussing the effect that wearing religious dress would have in the way employers assess them, meaning that they dressed differently for work rather than wearing an ‘Indian suit’.

Language was an issue raised both by one white male participant and by an Asian employer in Birmingham, who saw this as a customer service issue, but who did not seem to see it as a barrier to recruitment.

Again, race inequalities affect all ages. For older workers in our research, the issue seemed to focus on past regrets. The scars borne by first generation migrants, may affect their prospects in later life, so that they face a combination of barriers: race, age and, possibly, their own attitudes, based on past bad experiences.

### **6.3.12 Age Discrimination**

Age discrimination was a barrier specifically raised by a variety of participants across the region: both male and female, employed and unemployed. One participant believed that ageism could affect people as young as 40. Several participants believed that employers preferred younger people (on the grounds that they were cheaper). One particularly stark comment from an unemployed participant underlines the quandary faced by some older workers:

*“You’re on the scrapheap once you’re 50, no doubt about it.”*

Male, Unemployed

One other form of age discrimination referred to by participants relates to their lack of qualifications in comparison with younger people (see *Attitudes to Training* above). The move towards 'credentialism' in the labour market, where qualifications are viewed with increasing importance can discriminate against the older workforce. With a policy framework setting targets for larger numbers of people being qualified to graduate level, older workers who may be qualified to Level 3 or below are at a disadvantage in a labour market that increasingly specifies the need for graduates. In practice, this can mean that good practice equality recruitment practices can discriminate against older people, who may be qualified to lower levels than younger people.

Clearly, older workers believe they are facing multiple barriers to employment and career development. It is not easy to find solutions to all of these barriers – and, indeed, participants rarely suggested solutions, just raised the issues. Training as a route into work in different sectors and occupations is one solution (see Section 11 – Training and Learning), although the attitudes of some older workers could prove intractable relating to training. Good careers information, advice and guidance services for older people is also important (see Section 12 – Information, Advice and Guidance), to encourage them to move from declining sectors such as Manufacturing into growth sectors such as Health and Social Care. The LSC and its partners need to identify and support appropriate voluntary sector projects offering targeted support to people over-50 back into work or self-employment, especially those in the most deprived areas.

Identifying 'age positive' employers in the West Midlands, would be very helpful for the over 50s looking for work. The LSC and its partners need to encourage more employers in the West Midlands to become Age Positive Employer Champions, sharing good practice with employers across the region.

## 6.4 Summary

- Older people expressed a variety of incentives and motivations to employment and an even wider variety of barriers to employment or career development. This chapter indicates the wide variety of 'types' of people who comprise this older worker group. A one size fits all solution to labour market issues facing this heterogeneous group will not be successful. Tailored solutions based on the issues of particular groups will have more success.
- Attitudes to, and motivations for, employment varied most between those who were in work and those who were not. Among the workless, retired people were more likely to have a more positive attitude towards finding work than the unemployed.
- Generally the attitudes to employment from older people who were in work were more positive than those of the unemployed. However, this positivity was tempered by comments about the modern world of work, in which stress and paperwork seem to abound.
- Several employed participants perceived larger employers to offer more advantages to older workers, including: more structure in progression routes; better policy, including flexible working and job share; more age positive.
- The main motivation underpinning older people's requirement for work was the need for income or financial security. However, a number of other motivations for

work were expressed by participants, both employed and unemployed, including avoiding boredom; socialising; a sense of purpose; progression; suitable hours; and stress reduction (for some less demanding jobs).

- Older workers generally discussed barriers to their career development more than their future employment aspirations. This may be because in the context of this research, participants were more concerned about putting forward issues that in their opinion require changes in regional policy and practice. It may also be that the majority of participants had few aspirations for the future.
- Older workers had a wide variety of aspirations such as changing to a new career; returning to a previous expertise; retraining (to move into a new career); moving roles within a large organisation; continuing on a progression route with a large organisation; and winding down to retirement.
- Overall, participants currently in employment expressed more career aspirations than those without work; and younger participants expressed more ambition to progress than older participants. Women also seemed to be more open to retraining as a means of developing their career.
- Those participants who were out of work and in relatively deprived geographical areas had largely given up hope of returning to work. These people are a latent source of labour but would require a high level of assistance to return to the workforce.
- Older people perceived a wide variety of barriers towards gaining work or developing careers: their own attitudes; some transport issues; employer attitudes, especially in 'younger profile' sectors such as IT; health and caring issues, the latter especially a barrier for women; and discrimination, on grounds of gender, ethnicity, age and even postcode. While most employer respondents interviewed stated that they were not discriminatory in any way, older worker participants were clearly less sure that this is the case.
- Gender inequality affects old and young. For older workers in particular, women seem in some ways to be more flexible and eager to enter the changing workplace, but may also have more reason to do so (less pension provision). While women still seem to be taking on the large proportion of caring and home-making responsibilities, equality in the workplace, including equal pay, may not be achievable. This may affect older women increasingly in the future as they take on the dual burdens of childcare and caring for older relatives. Meanwhile for males coming out of traditional industries, moving into the Service sector can prove difficult.
- Race inequalities affect all ages. For older people in this research, the issue seemed to focus on past regrets. The scars borne by first generation immigrants, may affect their prospects in later life, so that they face a combination of barriers: race, age and, possibly, their own attitudes, based on past experiences.
- Training as a route into work in different sectors and occupations is one solution to the barriers older workers face, although the attitudes of some older workers could prove intractable relating to training.
- One form of age discrimination to which participants referred relates to their lack of qualifications in comparison with younger people. The move towards 'credentialism' in the labour market, where qualifications are viewed with increasing importance can discriminate against the older workforce.

## 7 EMPLOYER ATTITUDES TOWARDS OLDER WORKERS

The attitude of employers is perceived by older workers to be a barrier to gaining training, employment and career development. However, employers taking part in this research were generally positive about the contribution that older workers can make to the workforce. This may be because employers willing to take part in the research were more likely to have positive attitudes or good practice and policies relating to age (although by no means all respondents outlined good practice), or because interviewees wished to give positive messages about older workers given the nature of the research. Alternatively the belief and theory propounded by employers may not be matched in practice.

Employer feedback generally did not vary by location, sector or size. However, it needs to be borne in mind that policy and practice on the ground were more variable than such positive feedback would imply, with a wide variation between employers in the estimated proportions of older workers within their workforce (see Section 8 – Employment Policy and Practice).

### 7.1 Advantages and Disadvantages of Older Workers

Equal numbers of employer respondents defined older workers as being either over 50 or over 60, a smaller number classed older workers as being over 40. Around two thirds of employer respondents were over 40, and so were nearing the over 50s age bracket themselves. As the workforce ages, it is likely that management will age also. While this does not necessarily guarantee a more positive attitude towards older workers, it is likely to influence the way managers view them.

Employers across the board were positive about the benefits that older workers offer their businesses/operations as part of their workforce. Employer feedback related to the advantages of older workers generally did not vary by location, sector or size. Neither did it seem to be differentiated by the age of employer respondents, although there was a tendency for more detailed feedback about the advantages of older workers from respondents in their 30s and above. Many of the advantages of employing older workers mentioned by employers matched those expressed by people participating in the focus groups. Advantages of older workers perceived by employers included:

#### **Personal Qualities:**

- Loyalty, dedication and commitment.
- Reliability, stability and dependability.
- Resourcefulness, enthusiasm and bringing new ideas.
- Knowledge, life experience, maturity.
- Better work ethic, more conscientious.
- Flexibility, willingness to do a variety of tasks.
- Courteousness, brought up with an idea of service.

#### **Skills:**

- Existing skills, better trained (e.g. old-fashioned apprenticeships).
- Interpersonal and communication skills.
- Organisation/time management skills.

### **Practical Advantages within the Workplace:**

- Retention, less likely to leave or move job.
- Less of a risk to recruit because of experience.
- Less training required.
- Fewer family and childcare commitments, no need for parental leave.
- Better sickness record, higher attendance.
- Less need to earn.
- Mentoring younger colleagues
- Lower vehicle insurance.

Typical comments from employer respondents about the advantages of older workers included:

*“More loyal... Older people are looking for a job - they want a job because they've got commitments and need stability. More resourceful, committed and enthusiastic.”*

Employer, Small Organisation, Manufacturing Sector

*“More retention because people at that age are quite happy to do the job that they are doing rather than progress on to a career and usually with the training to progress skills and obtain better advantages elsewhere in the job market. For us, we do the training, yes it's costly, but then we do keep the staff. We don't feel that we do training that's then passed on and other companies benefit from our training. A lot of people at that sort of age are quite happy to continue on a general pay increase market rather than a massive pay increase, a massive bonus. For younger workers, the need for salary is higher (if they have a young family). Whereas, somebody in the older market would prefer the job security, comfort zone and stay where they are.”*

Employer, Medium Organisation, Manufacturing Sector

*“Life experience, tend to be less transient, moving around, more committed... I think it's great when we've got older workers that act as mentors for our younger staff, who've been in the business a long time and can pass on good practice. For younger workers, they can see there is a development route and a future, not just a part-time job to put some extra money in their purse.”*

Employer, Large Organisation, Health and Social Care Sector

### **Positive Example**

*“The company employs a higher percentage of workers aged 40-60 than 20-40 years. There was once a case study conducted by B&Q, before the Age Discrimination Act was instigated, where one warehouse was only staffed by people over 50 years of age. The warehouse had a higher rate of productivity, greater morale amongst staff, fewer absences, greater signs of commitment and customer satisfaction was higher than any of the other warehouses.”*

Employer, Large Organisation, Leisure Sector

Asked about disadvantages of employing older workers, employers had a greater tendency to say that there were none, exhibiting some unease that they might be seen as discriminatory. Thus the list of disadvantages of older workers was shorter than advantages, including:

- Health problems, more longer term illness.
- Issues doing more physically demanding jobs.
- Not as fit or quick.
- Reluctance to learn new things.
- Set in their ways, disliking change.
- Fewer qualifications.
- Shorter long-term prospects.
- Work at one pace, don't always step up the pace as required.
- Not receptive to training.
- Don't want to work full-time.
- Higher insurance premiums for workers over 65.

Typical comments included:

*“Can be sometimes a little set in their ways and not receptive to training. So they bring a lot of ideas, but they are not always willing to take on board new ones.”*

Employer, Medium Organisation, Agricultural Sector

*“May not want to do the amount of hours that a younger person wants to do, so they tend to be more part-time. They'll maybe not want to work so many days. That can be a disadvantage, but then again it can make the staffing in a branch more flexible.”*

Employer, Large Organisation, Health and Social Care Sector

Employers are more likely to respond positively to the benefits of employing older workers, especially the practical advantages for their workplace, than to information about population demographics (of which they made little or no mention and showed no interest). For this reason, it might be more productive to stress the advantages of employing older workers to employers across the region rather than communicating issues around the changing demographics of the workforce. Disseminating the findings of this research through trade bodies and Chambers of Commerce is one way of doing this. Sharing good practice and case study examples with employers is another.

## 7.2 Perceived Skills Gaps

In line with statistics relating to Skills Gaps in the West Midlands region (see Section 5 – Secondary Data Overview), employers listed a variety of skills gaps pertaining to their organisations and sectors. Especially interesting was the feedback from employers in the Manufacturing sector. Across the region, they were experiencing a shortage of engineers and operatives. This matches the findings of the NESS, which showed skills gaps for technical and practical skills and skilled trades and operatives in the region as being above the national average. Skills gaps listed by employers in this consultation were wide-ranging, including:

**Skills lacking:**

- Lack of product or industry knowledge.
- Communication/Interpersonal skills.
- Literacy skills.
- Numeracy skills.
- Customer service/handling skills.
- Language skills (both foreign languages and English as a second language).
- General IT user skills.
- IT professional skills.
- Office administration skills.

**Skills gaps by occupation:**

- Operatives, with the necessary certification.
- Lack of skilled trades (engineering, joinery, horticulture etc).
- Managers (Management skills).
- Professionals (HR skills, architecture skills, teachers in shortage subjects such as Engineering and Construction etc).
- Sales and retail staff.
- Care staff (Health and Social Care sector).

Employers gave a number of reasons why they were or were not concerned about skills gaps:

- Due to the economic downturn, a number of employers were having to make staff redundant, so both skills gaps and recruitment were low on their agenda.
- Employer respondents from growth sectors such as Health and Social Care, reported issues with retention.
- Some employers felt that there was a lack of adequate training, including certification, amongst candidates. One respondent from a Landscape Design company specifically mentioned that Apprenticeships did not include certification for the use of chainsaws and herbicides.
- One respondent from the Education sector noted that the policy for all tutors to have teaching qualifications could cause staffing issues amongst part-time tutors, especially those nearing or beyond retirement age.
- Employer respondents from the Manufacturing sector reported difficulties finding younger workers with the skills they required, believing that this declining sector was 'not sexy' enough.

Solutions to recruitment difficulties, skill shortages and skills gaps proposed by employers included training (both in-house and external) and, in a minority of cases, recruiting older workers.

There appears to be a mismatch between the feedback from employers in the Manufacturing sector and comments from some older people, especially those from the workless group in the Black Country. Manufacturing employers are seeking engineering and operative skills that some members of this group possessed and yet these older people seemed unable to find work. Travel or location may be an issue for some (though this was not mentioned by many older worker participants), as may their perceptions about employer attitudes towards them. As a declining sector, Manufacturing needs the skills that these older workers possess and some manufacturers have recognised this:

*“We are a conventional engineering company, and we struggle to get trained skilled engineers from a tool room background or working in Manufacturing where they've actually done setting more than operating... the more basic machines, it's as though the younger people have moved away from that to CNC, where they've been chasing the money. The older people have... been made redundant and found jobs in supermarkets... because of the drop off in Manufacturing industries in the UK, there are a lot of shortages. Most areas you can mould and blend, HR, estimator and purchase people, they've got those skills and they can blend them into many many industries. The actual hard skills down on the coal face are very much more difficult to do something about. If we turned our back on the older workforce, it would throw us into major problems.”*

Employer, Medium Organisation, Manufacturing Sector

### 7.3 Experience versus Qualifications

Employer respondents' contribution to the debate around experience versus qualifications as the basis of employability varied. A large minority (just over a third) of employers stated that when recruiting they would not alter the balance of requirements for experience and qualifications for older workers. It may well have been that some were uneasy about appearing to discriminate on the grounds of age. A number of employer respondents stated that the balance of qualifications and experience required depended on the job role (sometimes adding 'not on age'). Most employers' ideal would have been a blend of qualifications and experience, but this blend was often in short supply, especially in growing sectors such as Health and Social Care. Employers said that they were looking for the following relating to experience and qualifications:

- Personal qualities, including interpersonal skills (this was mentioned by employers in the Leisure sector).
- Professionals and skilled trades (managers, teachers, nurses, lawyers, accountants, horticulturists etc) needing professional qualifications and/or a degree.
- Non-professional, 'blue collar' staff (care staff, manual workers, administrative staff etc) requiring skills and experience, rather than qualifications.
- Literacy and numeracy skills.
- Industry sector experience.

Employers with in-house training programmes (usually in sectors with skills shortages/gaps, such as Health and Social Care, Education and Manufacturing) generally saw qualifications as being less important, as certificates and qualifications could be gained on the job. In-house and other training offered by employers included NVQs (usually Level 2 and 3), Apprenticeships, and Health and Safety training.

Several employers complained that candidates' CVs were not always accurate, and one made the point that there are difficulties if you only recruit based on experience rather than qualifications:

*“Experience is always taken into account. And if you get a balance of both, then that's the ideal. It's quite difficult to actually assess skills based purely on experience...”*

Employer, Medium Organisation, Agricultural Sector

Employers, especially those in sectors with skills shortages, seemed reasonably pragmatic in their approach to the balance between qualifications and experience required when recruiting. Candidates with both are the ideal, but employers recognised that such candidates are often in short supply.

## 7.4 Comparison Between Employers' and Older Workforce Views

Employers and older workforce participants were asked to agree or disagree on a scale of 1 to 5 with a series of statements related to older workers in the workplace. The mean scores for these statements reveal points of similarity and of difference in the views of employer and older people taking part in the research. The higher the score, the more in agreement with it were the participants (1 being completely disagree and 5 being completely agree).

**Table 1: Comparison of Employers' and Older Workforce Views**

Statements	Older Workers	Employers
People aged over 50 usually have fewer qualifications	3.2	2.6
Older workers are more reliable than younger workers when it comes to timekeeping	4.7	3.8
(Employers believe that) training older workers gives a limited return on investment	3.4	2.0
Older workers take less time off sick than younger workers	4.2	3.5
Older workers bring experience which can't be taught to the workplace	4.7	4.2
Younger workers are more willing to learn new skills than older workers	3.0	2.8
Employers/we would prefer to recruit older workers than school or university leavers	2.4	2.8
People over 50 want higher salaries	3.6	2.5
Organisations/our organisation rarely recruit(s) people who have been claiming incapacity benefit	3.1	2.1

Perceptions relating to the training and employment of older workers varied between employer and older worker participants. While both cohorts see older workers as more reliable timekeepers than younger workers, older workers were much more strongly in agreement with this statement than employers. Similarly, older workers were more strongly of the opinion that older workers take less time of sick than younger workers, with employers' mean score just above the neither agree nor disagree; and that older workers bring experience to the workplace that can't be taught, but with both groups agreeing strongly with the statement.

The widest variation in views between employers and older workers related to training. Older workers thought (although only marginally so), that employers believe that training older workers gives a limited return on investment while employers disagreed with this statement. Salary levels for older workers were also perceived differently: older workers agreed that people over 50 want higher salaries, while employers disagreed with this statement – perhaps reflecting the salaries taken on offer of appointment.

The disparities shown in response to these statements are in line with the points of similarity and difference revealed by older workers' and employers' comments in the rest of this research. While employers seemed aware of the advantages of older workers in the workplace, their policies and practice were more variable (see Section 8 – Employment Policy and Practice). Older workers, meanwhile, were suspicious about employers' attitudes, especially relating to training and recruitment.

## 7.5 Summary

- Employers taking part in this research were generally positive about the contribution that older workers can make to the workforce. This may be because employers willing to take part in the research were more likely to have a positive attitude or good practice and policies relating to age (although by no means all respondents outlined good practice), or because interviewees wished to give positive messages about older workers given the nature of the research. Alternatively the belief and theory propounded by employers may not be matched in practice.
- Employers tended to define older workers as being either over 50 or over 60, or in a few cases, over 40. Around two thirds of employer representatives were over 40, and so were nearing the over 50s age bracket themselves. As the workforce ages, it is likely that management will age also. While this does not necessarily guarantee a more positive attitude towards older workers, it is likely to influence the way managers view them.
- Many of the advantages of employing older workers listed by employers matched those mentioned by older workers themselves in the focus groups. Advantages of older workers perceived by employers included: personal qualities, such as loyalty, experience and reliability; existing skills including communication and time management skills; and practical advantages such as retention, less training, fewer family and childcare commitments. Some of these perceived advantages are clearly only true for certain segments of the older workforce.
- Asked about disadvantages of employing older workers, employers had a greater tendency to say that there were none, exhibiting some unease that they might be seen as discriminatory. Disadvantages of older workers listed were fewer than advantages, including: health issues; fitness, especially for physically demanding jobs; reluctance to change or train.
- Employers listed a variety of skills gaps/shortages. Employers from the Manufacturing sector across the region were experiencing a shortage of engineers and operatives. This matches the findings of the NESS survey, which showed skills gaps for technical and practical skills and for skilled trades and operatives in the region as being above the national average.
- Solutions to recruitment difficulties, skills shortages and skills gaps proposed by employers included training (both in-house and external) and, in a minority of cases, recruiting older workers.
- Employers gave varied responses about their requirements for experience and qualifications. A large minority stated that when recruiting they would not alter the balance of requirements for experience and qualifications for older workers. This may be a disadvantage for older workers where qualifications required and desired by employers for a wide range of jobs seem to have risen.

- Employers said that they were looking for the following types of experience and qualifications: personal qualities; professional qualifications / degrees for professionals and skilled trades; skills and experience for non-professional roles; literacy and numeracy skills; and industry sector experience.
- Employers with in-house training programmes (usually in sectors with skills shortages/gaps) generally regarded qualifications as being less important at the recruitment stage, as qualifications could be gained on the job. In-house and other training offered by employers included NVQs (usually Level 2 and 3), Apprenticeships, and Health and Safety training.
- Employers, especially those in sectors with skills shortages, seemed reasonably pragmatic in their approach to the balance between qualifications and experience required when recruiting. Candidates with both are the ideal, but employers recognised that such candidates are often in short supply.
- Perceptions relating to the training and employment of older workers varied between employer and older worker participants. Both cohorts were positive about older workers' timekeeping, attendance and experience. However, older workers thought that employers believe that training older workers gives a limited return on investment, while employers disagreed with this statement. Older workers also believed that older workers want higher salaries, while employers did not.

## 8 EMPLOYMENT POLICY AND PRACTICE

Law relating to age discrimination has been in place since the Age Discrimination Act 2006 came into force and good practice recommendations have been published by ACAS and others (see Section 4 – Literature and Policy Review). However, implementation of both policies and practice may not always be consistent across all employers, as our findings from this West Midlands research reveal.

### 8.1 Recruitment

Regarding recruitment of older workers, many of the participants, both employed and unemployed, were dubious as to the efficacy of anti-age discrimination policies and the law. Indeed some of the language used by participants shows how ingrained perceptions of age are.

*“I don’t think, unless you can actually prove it, that they’ve given the job to a younger man. How do you prove it?”*

Male, Unemployed

*“It makes no difference really though because they won’t give the job to someone who is too old they’ll just make another excuse for why you weren’t right for the company.”*

Male, Computer Engineer

Several participants commented in a professional capacity about the behaviour of employers relating to age, demonstrating both good and poor practice. One participant who worked for Jobcentre Plus commented:

*“I don’t think employers always understand them [anti-age discrimination laws] because they come down to the Jobcentre and try to put up adverts that specify the age they want!”*

Female, Jobcentre Plus Employee

A couple of older worker participants commented about their role as recruiters, relating to age – giving an example of the variability of employer practice that can take place:

*“Age discrimination has made a difference as a recruiter. Until you have that person in front of you, you don’t know about their age until they are sat in front of you.”*

Female, Service Care Manager

*“I’ve done it myself though when recruiting. I used to think that someone aged 40 was burnt out in sales. We’re living in an ageist society.”*

Male, Product Manager

#### 8.1.1 Employers and Recruitment Policy

The employer interviews revealed more about employer policy and practice in the West Midlands relating to recruitment and employment:

- 34 out of 50 employer respondents said they had an equal opportunities policy that included age. There was evidence that having a policy varied

according to organisation size: 9 out of 19 small companies said they had an equal opportunities policy of this nature, compared with 14 out of 20 medium companies; and all 11 large employers (200+ employees) said they had policies of this kind.

- 21 out of 50 employer respondents said that they monitored data for pay and recruitment to identify discrimination, while only 11 of these said they monitored by age. Once again, organisational size was a factor. No small companies monitored data by age; 5 out of 20 medium companies said they monitored data by age; and 6 out of 11 representatives from large companies said they monitored by age (the other 5 respondents were not sure).

The nature of responses from employers suggests that organisation size is a factor that affects an organisation's approach to policy. Such variability relating to anti-age discrimination policy by size of organisation, was raised by one older worker participant:

*"People are still asking how old you are. Especially for small companies, I don't think it's sunk in. The big companies take it on board, but I don't think small companies do."*

Female, Manager Medical Education

However, the size of a company does not necessarily affect practice regarding recruitment or retention of older workers. Asked to estimate the proportion of their workforce that was aged over 50, estimates from small employers ranged from 6% to 80% (excluding the two smallest companies, with a variation between 0% and 100%!) The proportions estimated by medium employers were similarly varied – between 5% and 75%; while employer representatives for larger organisations estimated that their proportion of older workers was between 10% and 40%.

There was little overt evidence in our research of a division between public and private sectors in relation to recruitment policy and practice, as some national studies have previously found (McNair, Flynn and Dutton, 2007). Respondents from Health and Social Care, Education and the Voluntary/Charitable sectors were generally clear about policies and practice, but so were representatives from Manufacturing. Overall, size was the determining factor relating to the likelihood of having policies relating to age but with no discernible effects on the likelihood of recruitment of older people themselves. That is, while we see a relationship between policy and size of organisation; this relationship does not extend to the proportions of older workers employed.

### **8.1.2 Addressing Recruitment Challenges**

A number of employers stated that they were having problems with recruitment. This applied more to employers who were in rural locations, or who required a large number of seasonal casual workers, such as the Agricultural sector:

*"To get the right people to fulfil all the roles that we need.... Recruitment issues across the board, starting with the more senior team to find qualified and suitable people to come in and take those kind of roles, down to being able to get sufficient number of seasonal agricultural workers."*

Employer, Medium Organisation, Agricultural Sector

When asked about the ways they were addressing these challenges, no employers mentioned specifically recruiting older workers (although mention was made about

how in some cases, especially Manufacturing, older workers were 'plugging' skills gaps – see Section 7 – Employer Attitudes towards Older Workers). A variety of solutions for recruitment challenges were given by employers, including:

- networking;
- providing flexible hours;
- offering relevant training and induction to new staff;
- training existing employees for new roles;
- recruitment advertising (and better targeting of advertising);
- using contract staff;
- using recruitment agencies; and
- using foreign workers.

Employers interviewed mainly stated that they did not target older workers in recruitment. In many cases, employers did not want to be seen as discriminatory about age:

*“We don't want to be biased on the basis of age.”*

Employer, Medium Organisation, Retail Sector

Employers also said that they saw skills as more important than age, when it comes to recruitment:

*“The company encourages applicants of any age. All jobs are advertised generally. Age is not a critical factor, but skills for the job are. The company does not put age limits on its applications.”*

Employer, Medium Organisation, Manufacturing Sector

One employer respondent working in a recruitment capacity in the IT sector, underlined the changing practice relating to age over time:

*“When we advertise, more and more it's on internet sites. It's quite a uniform advert, stating what the job is, job title, job description, and what we are looking for in terms of experience (but can't specify length of experience). When I first started doing recruitment it used to be 'you will be aged 20-25, with 2 years experience in internal sales' well, you can't do that now. I thoroughly agree with that because it was ruling out people of more mature years.”*

Employer, Large Organisation, IT Sector

Employers are addressing recruitment challenges in a variety of ways. However, specifically targeting older workers does not generally seem to be one of them. Some employers saw recruiting older workers as a means of closing skills gaps, but the vast majority did not perceive recruiting older workers as a solution to their HR issues.

## **8.2 Awareness of Anti-age Discrimination**

Awareness of anti-age discrimination proved variable amongst both older workers and employers. A majority of unemployed participants were unaware of the legislation, and dubious about its efficacy (see above). While older people in employment seemed more aware of the law, they were equally uncertain about the way that employer practice may change in relation to it (see above).

Employer respondents demonstrated reasonably high (though by no means unanimous) awareness of anti-age discrimination:

- Four fifths of employers interviewed said they were aware that there had been new legislation about age and employment in the last 2 years. All respondents from medium and large companies were aware of the new legislation.
- 39 out of 50 employers knew about the right to request staying on past state pension age (14 of these were aware of this unprompted).
- 38 out of 50 employers knew about the right to request flexible working for workers with care responsibilities for the elderly (7 of these were aware of this unprompted).
- 30 out of 50 employers knew about tax rules permitting workers to draw pensions while remaining in work (4 of these were aware of this unprompted)
- 42 out of 50 employers were aware of age discrimination legislation (21 of these were aware of this unprompted).

In terms of practice related to anti-age discrimination legislation and policies, just over a quarter, 14 out of 50, of employers said that the legislation had not made an impact 'on the ground'. In some cases, this was because they believed they already had good practice in place, in others they were rather vague about the implications of the anti-age discrimination law:

*"Heard something about changes, you can't positively discriminate against an older person, not sure if it's the same for younger people. Not really [changed our practice] we'd have considered a request like this anyway."*  
Employer, Small Organisation, Publishing Wholesalers

*"The legislation hasn't had an impact on the organisation's practices - other than the increase costs..."*  
Employer, Medium Organisation, Manufacturing Sector

*"Specific changes include the removal of date of birth from application forms, flexible working, staying past SPA, etc: we have been practicing this for 4-5 years, so didn't need to change for the legislation."*  
Employer, Large Organisation, Retail Sector

Implemented changes mentioned by employers related to anti-age discrimination law and/or policy included:

- Not asking for age on application forms.
- Equality impact assessments.
- Flexible working.
- Writing to people approaching 65 to give them a choice about retirement.
- More formalised practice (in situations where practice was good already).
- Changes to sick pay and pension contribution policy.

While a number of employers have made few changes to policy, or feel that they do not need to alter practice, others have recognised the need to change. One example of good practice relating to anti-age discrimination and practice is given below.

*"We have removed ages off application forms, and are a lot more aware and careful about age discrimination. It's affected recruitment, being a fairly big*

*company, we have to be a lot more aware of it. We are looking at our job specs and person specs prior to interviewing, removing anything that could be age discriminatory. We are removing direct age, not taking people above or below a certain age group and also looking at the specifications for different job roles, making sure that it doesn't automatically discriminate. With the advertisements, I am very careful that there is no message out there saying 'young people welcome'!"*

Employer, Medium Organisation, Agricultural Sector

### 8.3 Managing Retirement

The majority of employer respondents (31 out of 50) stated that the official retirement age of their organisation is 65, or SPA. One respondent gave a company retirement age of 67. 12 out of 50 respondents said that they had no set retirement age. However, many of those that provided an official retirement age did not see this organisational retirement age as set in stone. Rather, retirement was seen as an individual's choice, so long as they were fit and capable of doing the role. Over half (28) of employers interviewed cited examples of employees who had stayed on beyond state pension age, in a wide variety of roles, including managerial, administrative and manual.

The practice of retaining staff beyond retirement age once again seems to be affected by organisation size. Only 3 out of 19 respondents from small companies said they knew of staff staying on beyond SPA, compared with 15 out of 20 from medium organisations and 9 out of 11 from large firms.

Only a handful of employer respondents were able to outline specific good practice relating to the management of retirement for their staff. Examples of good practice are shown below.

#### **Good Practice Examples**

*"We have a support team that comes into the home to explain pensions and benefits to them. "*

Employer, Small Organisation, Health and Social Care Sector

*"We don't look at people for an age; we look at people for the person. That sounds very very simplistic, but actually doing it is a very different matter. We look at the monitoring, we know that you can find someone's age from an application, but we genuinely don't do that. We look at the person and the competencies and the abilities that they have and not at their age. It's just supporting staff, whatever their needs are. "*

Employer, Large Organisation, Education Sector

*"[Large retailer] encourages retirement at 65 and in the last 12 months they phase you down to 4 days a week to 3 days a week in the last 6 months. So you can start to get into the habit. I don't know of many other companies that do this. "*

Male, Sales Manager, Retail Sector

One large retailer interviewed offers a package of flexible working and family friendly policies to its staff, including care leave for up to 26 weeks to care for a sick or elderly relative or friend; job share; shift swapping schemes; and grandparents' leave.

There is evidence of variation in employer practice, especially by size, relating to the management of retirement. Some employers are still unaware of the law relating to the management of retirement, and only a few employers interviewed seemed to have 'gone the extra mile' in supporting older workers as they enter retirement.

There needs to be more awareness of the law and of good practice relating to the management of retirement, and other anti-age discrimination practice, especially for smaller companies. One good route would be to disseminate case studies and articles about good practice via trade organisations and local Chambers of Commerce within the West Midlands.

## 8.4 Summary

- Implementation of policies and practice relating to age was not consistent across employer respondents in the West Midlands.
- Many of the participants, both employed and unemployed, were doubtful as to the efficacy of anti-age discrimination policies and the law relating to the recruitment of older workers.
- There is evidence that organisational size affects the likelihood of the existence of age-related employment policy and data monitoring. The larger the company, the more likely it will have an equal opportunities policy mentioning age and that age data will be monitored to identify discrimination. There is no relationship, however, between the proportions of older workers on the workforce and size of organisation. We may surmise that practice may not be directly affected by the existence of formal policies relating to age although further research would be needed to verify this.
- There was little overt evidence in our research of a division between public and private sectors in relation to recruitment policy and practice, as some national studies have previously found (McNair, Flynn and Dutton, 2007).
- A number of employers stated that they were having problems with recruitment. This applied more to employers who were in rural locations, or who required a large number of seasonal casual workers, such as the Agricultural sector.
- Employers were addressing recruitment challenges in a variety of ways including networking; providing flexible hours; offering relevant training and induction to new staff; training existing employees for new roles; recruitment advertising; using contract staff; using recruitment agencies; and using foreign workers.
- Specifically targeting older workers does not generally seem to be seen as a solution by employers. Some employers saw recruiting older workers as a means of closing skills gaps, but the majority did not perceive recruiting older workers as a solution to their HR issues.
- Awareness of anti-age discrimination varied amongst both older workers and employers. A majority of older people not in employment were unaware of the legislation, and dubious about its efficacy. While older people in employment seemed more aware of the law, they were equally uncertain about the way that employer practice may change in relation to it.

- Four fifths of employers interviewed said they were aware that there had been new legislation about age and employment in the last 2 years. All respondents from medium and large organisations were aware of the new legislation.
- In terms of practice related to anti-age discrimination legislation and policies, just over a quarter of employers said that the legislation had not made an impact 'on the ground'. In some cases, this was because they believed they already had good practice in place, in others they were rather vague about the implications of the anti-age discrimination law.
- The research also revealed some examples of good practice by employers relating to age, such as providing a support team to explain pensions and benefits to staff approaching retirement; phasing down to retirement; flexible working; job share; shift swapping; and grandparents' leave.
- Implemented changes mentioned by employers related to anti-age discrimination law and/or policy, included not asking for age on application forms; equality impact assessments; flexible working; writing to people approaching 65 to give them a choice about retirement; more formalised practice (in situations where practice was good already); changes to sick pay and pension contribution policy.
- The majority of employer respondents stated that the organisation had an official retirement age, mainly of 65 or SPA. The remainder said they had no set retirement age. It was seen as an individual's choice when they retired, so long as they were fit and capable of doing the role.
- Over half of employers interviewed cited examples of employees who had stayed on beyond state pension age, in a wide variety of roles, including managerial, administrative and manual.
- There is evidence of variation in employer practice, especially by size, relating to the management of retirement. Some employers are still unaware of the law relating to the management of retirement, and only a few employers interviewed seemed to have 'gone the extra mile' in supporting older workers as they enter retirement.
- There needs to be greater awareness of the law and of good practice relating to the management of retirement, and other anti-age discrimination practice, especially for smaller companies.

## 9 ALTERNATIVE WORKING PATTERNS AND SELF-EMPLOYMENT

As identified in the Literature and Policy Review (see Section 4), people aged over 50 often wish to continue in work if it is flexible, such as part-time working or flexitime (McNair and Flynn, 2004; HSBC, 2005; Vickerstaff, 2006; TAEN, 2007). These previous findings were borne out by the current research, conducted with both older people and employers in the West Midlands.

Self-employment is another transition in working life that is sometimes taken by older workers, if they are having difficulty finding other forms of employment, or by some, usually from professional backgrounds, as a positive first choice. Government views this route as a way of extending working lives, and growing numbers of people aged 50+ are taking this option, see Section 4 – Literature and Policy Review. The majority of participants in the focus groups were employed, of whom some had considered self-employment. Others were either currently self-employed or had been self-employed in the past.

### 9.1 Alternative Working Patterns

Participants from several of the groups touched on the benefits of alternative working patterns for their lives. Some group members were already employed in a part-time or voluntary capacity. An interest in part-time working was expressed across all ethnic groups that participated and by both men and women. The following alternative working patterns were seen as positive by participants:

- Flexi-hours
- Part-time working (3 or 4 days)
- Job-share.

In the Shropshire focus group of unemployed people, 4 out of 9 participants were looking for part-time work, all of them women.

Across the groups, reasons given for wanting alternative working patterns were generally related to stress:

*“I’m 53, I’ve got a 12-year-old son, I’ve got to juggle with the school holidays. As you get older, you don’t want to... do full time. I want a less stressful situation. But the jobs aren’t there for the hours, really, if you want to do three days, job-sharing, there’s not much flexibility.”*

Female, Unemployed

Only a few participants had experienced flexi-time in their workplaces. Some worked for employers that were flexible, while not having an official flexi-hour scheme:

*“We’re quite open, it works both ways, we take time off we make it up again but it’s not an agreed [policy].”*

Female, Manager for Large Manufacturer

Only one person mentioned working from home or, when travelling, using a laptop.

The findings about alternative working patterns for older workers are borne out by the response from employers. Of the employers interviewed just over a quarter (14 out of

50 respondents) mentioned some form of flexible hours or working for staff (generally not differentiated by age). All but one of these organisations were medium-sized to large employers, ranging between 60 and 11,000 employees. Only three of these employers (from the Education, Health and Social Care and Legal sectors) mentioned policies specifically relating to flexible working, and only one employer, from the Education sector, mentioned flexi-time. Three employers stated that flexible working hours were not encouraged in their organisation, two of these were from the Manufacturing sector, and the third provided IT services. The contrast between sectors' approaches to flexible working is illustrated below:

*"Flexible working is a difficult thing within the industrial sector. They are not very receptive towards it. I've got a wife who works in the Public sector and I know that if I mentioned how she works to a manager here, he'll say "Well how can we fit a business around that? We're here to make money, not suit people," sort of thing... It is not something that the Manufacturing sector is into."*

Employer, Medium Organisation, Manufacturing Sector

The feedback from employers related to flexible working implies that flexible working practices are far from uniform. Respondents showing awareness of flexible working were typically from sectors such as Education, Retail, Charitable/voluntary and Health and Social Care. Respondents from Construction, Leisure and the Legal profession also mentioned flexibility. The employer representatives interviewed were generally very careful to point out that their policy and practice relating to flexible working was not age-related, with some mentioning business need as the most important driver:

*"We deal with each case individually. We do have a policy to deal with this. But what we have to look at is how it fits the business need. And of course our business is driven by the clients. So sometimes there could be a decision that is not necessarily the decision that the employees would like to have. Some have been accepted, some have been modified, some have been rejected. Age is not an issue."*

Employer, Medium Organisation, Legal Sector

Respondents from Education tended to be much more open about the opportunity for flexible hours and part-time working:

*"We have flexible hours for everybody, it's just the same thing for everybody. We have part-timers, we have full-timers. You have to make the request in writing and you send it to your manager and we look at it. We have flexi-time for working hours. It's the same thing for everybody."*

Employer, Medium Organisation, Education Sector

Clearly, some employers do offer flexible and part-time working to their staff, but older workers seeking alternative working patterns may need to consider the sectors and sizes of company that they apply to carefully. There may sometimes be a mismatch between the experience and background of older workers and the sectors that are offering the working patterns they may be seeking. This gap can be addressed by training (some of the employers, especially in Education and Health and Social Care were keen to point out that they offered full initial training to staff fitting into areas where there were skills gaps – see Section 11 Training and Learning for further details).

## 9.2 Self-Employment

The majority of participants in the focus groups were employed, of whom some had considered self-employment. Others were either currently self-employed or had been self-employed in the past. Generally, those who had experience of self-employment were more positive about it as an option than those who had not.

### 9.2.1 Advantages of Self-Employment

The advantages of self-employment were seen by participants as:

- freedom to do what you want;
- earning capacity; and
- reaping the rewards of hard work.

One male, the proprietor of a nursing home was very positive about self-employment:

*“I’m self-employed, it’s just freedom of choice, please yourself. I like that. I shall always be self employed. I have been employed in the past in engineering. Being told what to do all the time was too restricted.”*

Male, Proprietor Nursing Home

A female older worker also contrasted being employed with self-employment – and the advantages of the latter related to earning capacity and reward for hard work:

*“Five years ago I was self-employed and I’ve finished being self-employed and started this job and being employed by someone else. It was a massive relief to start with, because you got a steady income etc, but now I’m feeling frustrated because I haven’t got the opportunities I had to make more money. If I work harder now I get no more money. If I worked harder when I was self-employed I got more money. And at the end of the day, money is the key isn’t it...and job satisfaction as well obviously...”*

Female, Mental Health Support Worker

### 9.2.2 Disadvantages of Self-Employment

Participants from all groups were quicker to point out the disadvantages of self-employment than its advantages. There may be a ‘fear factor’ here. While some self-employed participants did point out disadvantages, most of the disadvantages were given by those who had never been self-employed, so these may be seen as an attitudinal barrier to self-employment.

The disadvantages and barriers to self-employment given by participants are summarised below:

- Competition.
- Not having a marketable skill.
- Legislation, tax and paperwork.
- Costs/outlay versus returns on investment (related to participant’s age and so limited years of earning capacity).
- Insecurity.
- Lack of company benefits (e.g. holiday pay, sickness pay).
- Benefits trap (making low-paid self-employment not worth the effort).
- Long hours.

Insecurity in particular, combined with life circumstances or existing commitments, seemed to be a disincentive to participants who otherwise might have considered self-employment:

*"I did consider it at one stage, but our circumstances changed and we needed some time out to care for our son who is disabled, we needed a fixed income so I carried on my work training in finance."*

Female, Finance Co-ordinator

The likely return on investment for an older worker having to pay out high set up costs versus the years of earning potential was also key for some unemployed participants in the Black Country group:

*"Because of the health and safety laws, if you set up as self-employed tomorrow you need a 'passport to safety', cherry-picker licence, health and safety, it's £150 for a one-day course and without that you can't get a job. You've got to have insurance and everything."*

Male, Unemployed from Engineering Background

Another participant in this group, from the building trade, reckoned it would cost £10,000-15,000 to set up: money which he didn't have, and which he believed he would struggle to get back in earnings, given his age (63).

For unemployed older people in particular, self-employment could be a way back into the world of work, but a variety of barriers including attitudinal and financial factors stand in the way for some.

### **9.2.3 Choosing Self-Employment**

Despite the barriers, self-employment can be a means of staying in work for older workers. Nationally, growing numbers of over 50s are taking this option, and Government views it as a way of extending working lives, see Section 4 Literature and Policy Review. Dependent on life circumstances or monetary needs, self-employment can also provide the flexible working practices that some older workers desire. Those with caring responsibilities or other calls on their time can set up their own business for part-time hours if they prefer. However, these possibilities were not explored by the regional older worker groups.

As Government is seeking to encourage more people into self-employment, and especially under-represented groups such as women, it is important to emphasise the flexibility of self-employment and tackle negative perceptions of self-employment. Jobcentre Plus could play a key role in signposting older workers to organisations such as Business Link that can offer support to them as they consider self-employment. Holistic support services need to be offered to older workers, giving them the opportunity to consider not only employment, but self-employment, as a route back into work.

A matrix template of which types of people would be suited to self-employment by types of self-employment (occupational/sector and start-up costs/returns) could be developed that could segment older workers, this most heterogeneous of groups. Clearly, for those older workers who still have mortgages and debt, setting up a business later in life that has high set-up costs and long returns on the capital may not be ideal. However, for others, especially those with skills that are in short supply,

this may be a perfect solution. Due research into the economy and how it is affecting demand for various goods and services also needs to be undertaken so advisers can provide best guidance. Some form of training tool could then be developed for Jobcentre Plus and IAG staff based on such research.

Both the advantages and disadvantages are well-summarised by a participant who had previously been self-employed, but is now in employment:

*“I think everybody would like to try to be self-employed, it’s sort of everyone’s dream to be his or her own boss... I worked for myself for 8 years. Basically I made a lot of money for myself... Having a job and getting a pay packet every month is a secure thing - you know that it’s coming and if you’re working for yourself it’s a chance. It can either work very well, it can work well, it can work poorly, or not work at all. Basically working for someone else is always easier because you know that if you worked there for a month then you get a month’s pay at the end of it.”*

Male, Product Manager

### 9.3 Summary

- Participants from several of the groups touched on the benefits of alternative working patterns for their lives. Some group members were already employed in a part-time or voluntary capacity. An interest in part-time working was expressed across all ethnic groups that participated and by both men and women. Their preferences included flexi-hours; part-time working and job share
- Only a few older workers had experienced flexi-time in their workplaces. Some worked for employers that were flexible, while not having an official flexi-hour scheme.
- Of the employers interviewed just over a quarter mentioned some form of flexible hours or working for staff. Of these organisations all but one were medium-sized to large. The offer of flexible working for staff is not dependent on the age of the worker, rather is based on the type of business or the sector in which it is operating.
- The feedback from employers implies that flexible working practices are far from uniform. Manufacturing respondents indicated that working practices in their sector were less flexible.
- Some employers do offer flexible and part-time working to their staff, but older workers seeking alternative working patterns may need to consider the sectors and sizes of company that they apply to carefully. There may sometimes be a mismatch between the experience and background of older workers and the sectors that are offering the working patterns they may be seeking.
- For those employers wishing to retain their older workers but who may not have immediate part-time positions or flexible hours, the introduction of job carving could be a solution.
- The majority of participants in the focus groups were employed, of whom some had considered self-employment. Others were either currently self-employed or had been self-employed in the past. Generally, those who had experience of self-employment were more positive about it as an option than those who had not.

- The advantages of self-employment were seen by participants as freedom to do what you want; earning capacity; and reaping the rewards of hard work.
- Participants from all groups were quicker to point out the disadvantages of self-employment than its advantages. Most of the disadvantages were listed by those who had never been self-employed, so these may be seen as an attitudinal barrier to self-employment.
- The disadvantages of self-employment given by participants were competition; not having a marketable skill; legislation, tax and paperwork; costs/outlay versus returns on investment; insecurity; lack of company benefits; benefits trap; and long hours.

## 10 FINANCIAL PROVISION FOR RETIREMENT

Participants from the older workforce across the West Midlands took a variety of approaches to providing for themselves in retirement. As might be expected, there was some variation in the attitudes and experiences of those who had recently retired and those who were still in employment; those with secure occupational schemes, and those without; and men and women. People had taken a number of approaches to retirement, more or less entrepreneurial, depending on life circumstances and personality. Discussions about preparing for retirement were mainly based on monetary issues, but there was also a mention of quality of life, exploring voluntary work or part-time work. Older worker participants showed little or no awareness of tax concessions allowing them to draw down pensions while in work. Employers also showed lower awareness of this area of anti-age law than others (see Section 8).

### 10.1 Pension Provision

The majority of participants had paid or were currently paying into pension schemes, most of them occupational. Among those who had recently retired, paying into a pension scheme was seen as 'what you did' rather than planning for retirement:

*"I joined the superannuation scheme which tied in with the Government pension, what you call private pension...I didn't plan. I didn't plan at all."*  
Male, Retired Bus Driver

Paying into a pension scheme was less prevalent amongst some women in the 60+ age range, who had relied on their husband's pension provision:

*"You used to think your husband would get a pension. You would be looking after the children etc."*  
Female, Over 60, Accounts Office Manager

*"Well I was married and my husband had a business. I supported him, but probably was a mistake when it came to getting a pension. I worked very hard."*  
Female, Over 60, Retired from College

However, younger females seemed more likely to recognise their need to provide for their own retirement independently:

*"We have got a pension going. The employer contributes and then we can put in some more money as well so that's what I do."*  
Female, Under 50, IT Project Manager

Rather than a straightforward gender divide, the delineating factor between men and women and retirement planning is the arrival of children and whether (usually) women take more responsibility for caring by going part-time or having a career break. These decisions have implications on pension provision and thus we see more women with shortfalls in pension.

A number of participants had worries about pension schemes either because of an unplanned change in life circumstances, such as redundancy or ill-health, or due to more general concerns about the direction in which pension schemes are heading:

*“When we were younger we always knew there’d be an old-age pension of some sort. We would always think we’ve got some sort of pension to live on. Your parents always had a pension to live on, and it was automatically paid to you when you give up. Things are now changing so much that you can’t even guarantee that... There’s also the situation that – they used to pay you according to your last pay packet. Nowadays, they’re reducing your hours and it’s getting less – they’ll be lucky now if they get anything at all.”*

Female, Over 50, Administrator for an Ambulance Company

This participant has raised an awkward reality of many pensions which contradicts ‘winding down’ or prevents the flexibility of reducing hours/going part-time, that is that many pensions are calculated using the final year’s salary. Unless a person has fulfilled the necessary years’ contributions, such clauses can prevent flexibility.

Other participants talked about the necessary trade-off between financial security today and planning for the future:

*“How many people do plan for old age, I’d like to know? Because the ones I speak to, friends, don’t: they’re so busy struggling for today”*

Female, Unemployed

Generally, the participants who seemed best provided for were those who had been in a secure occupational scheme, often retiring early and then having a second career:

*“I’ve still got my pit pension so I keep getting the bonuses every year so I roughly know, between 55 and 60 what I’m going to get. I keep thinking I’ll retire from full-time work and just get a little part-time job and get my pension as well. I’ve got mates who are 53, 54 and they’ve started getting theirs and as I say they just do little bits of part-time work just to make it up... Sounds good to me!”*

Male, Double-glazing Salesman, previously a Miner

Two of the Afro-Caribbean participants, who had belonged to occupational pension schemes for the buses and with the NHS, were planning on moving to the Caribbean to enjoy their retirement.

## 10.2 Investing in Property

Participants in the Afro-Caribbean group in Birmingham and in one of the Staffordshire groups had invested in property as a means of securing their retirement. A less affluent, but very provident, Afro-Caribbean female had had two careers, taking early retirement from catering, and then having a second career in social care, which enabled her to pay off the mortgage on her house and then invest in a second property.

*“...now I’m living off of that investment, so I did prepare for retirement. I finish paying off my house, and I invest that into another property. So I didn’t do too bad.”*

Female Afro-Caribbean, Retired from Caring and Catering

A more affluent male from Staffordshire had used his earnings to invest in property:

*“... my game plan is, I’m 53 now I want to pack in when I’m 60 if I can. We live in a bigger house – when we bought it it was part of the retirement plan... So we’re hanging on to that and we’ve bought a property in Bulgaria which we hope in the next two or three years will make us some money. So hopefully by the time I’m 60 we’ll be able to sell that lot have a nice little place in the UK and a nice little place abroad somewhere and have 6 months in each.”*

Male, Computer Engineer

Obviously investment in property is dependent on the, previously booming, housing market. The credit crunch (Autumn 2008) will increase the value of the rental market but many will find that they may face a funding gap if hoping to realise capital from their property investments in the UK now or in the near future.

### 10.3 Working after Retirement

The main motivation for working after retirement was seen by participants as money. Several participants expressed worries about being able to afford to retire. One retired participant was looking to find work due to her financial situation:

*“If there was something that I could do... I would consider it because I need money. I haven’t got enough to get by on.”*

Female Afro-Caribbean, Retired

Another had observed how vicissitude had forced people to continue in work:

*“I work with 3 or 4 people who are over 60 and they’ve got no choice other than to work until they drop really, or until they’re kicked out of work because of different things that have happened them; their husbands have died or whatever so they’ve got to work to pay off mortgages and whatever.”*

Female, Mental Health Support Worker

However, there was some evidence that working after retirement might not just be motivated by financial concerns:

*“I think that’s too big a shock if somebody just suddenly stops work. I think that’s when depression sets in because they’re bored.”*

Female, Self-employed

A number of participants were involved in voluntary work in their retirement, while others expressed an interest in looking into voluntary work activities. Some were using voluntary work as a way of easing themselves into retirement; others were looking to make a contribution; while others found voluntary work more satisfying than the paid work they had done. Those engaged or thinking of being engaged in voluntary work were from both urban and rural areas of the region; and were from different ethnic groups, both men and women. The Afro-Caribbean participants were especially enthusiastic about voluntary work as a means of stimulation, giving them opportunities to travel to parts of the country beyond the West Midlands. Feedback from other participants is below:

*“I found voluntary work – it was such a shock to the system retiring.”*

Female, Retired

*“I thought, like a lot of people, that I’ve got all this vast knowledge and experience, I would like to contribute, in some way. Even in a voluntary way.”*

Male Asian, Retired

*“I’m very happy in my role. Happier now, I do actually do voluntary work for Macmillan. I feel more useful now than when I was at work.”*

Female, Retired

One of the participants was involved in mentoring young people:

*“Because it’s the voluntary sector we get people in and the main thing with youngsters is confidence dealing with people. They don’t seem to have the confidence. So we actually teach them how to talk to people and how to have a laugh and a joke, people skills, with them and they’re going out and getting proper jobs now...”*

Male, Retired

Insofar as the current research has located a hidden or latent pool of skills among older workers, there are many who consider voluntary work post-retirement. However, luring this cohort back into the paid workforce presents conundra: first it may render the voluntary sector short of skills and labour; second, this group may have chosen voluntary work over paid work, so may not present themselves available for paid work.

Feedback from employers confirmed the importance of the contribution that older people can make in the voluntary sector:

*“We do usually get a good mixture of age in applicants. We have a very wide volunteer base, we have nearly 600 volunteers. So when we advertise we tend to let everyone know, so we often get people who come through that route. We employ quite a few people who retire from the local authority and then they perhaps want to pick up a second career ... part-time. We employ a lot of part-time staff. So we have quite a lot of people who come in with a broad range of experience and what they are coming to do might be very different, but they’ll be bringing different types of experience. Often they would have qualifications as well from the local authority but not always.”*

Employer, Charitable/voluntary Sector

As this quotation shows, voluntary work can also be a route back into paid employment, should older workers wish to return to paid work. Employers from the Charitable/voluntary and Education sectors were the most open to offering part-time roles to people who might be embarking on a second career.

However, this employer also wondered if the pool of skills that they could currently access in the area (Shropshire) might change over time:

*“In terms of the ongoing need to find staff, I wonder if the profile will change of people coming through to us, because we do get a lot of people who are coming through to us and salary is not such an issue as well as it would be for a younger person... We’ve got a generation coming through now who have done very well. They’ve done very well most of them have had free education, degrees, and they’ve done very well out of the housing market and well out of the pensions. People won’t have the same benefits [in the future].”*

Employer, Charitable/voluntary Sector

Indeed, the lack of adequate retirement provision for the generations coming through in the next two decades noted in the media may provide a cohort of older people requiring paid work to finance their lifestyles into old age. The more flexible labour market that sprang up through the 1980s with less secure private pension plans or those with lower returns may result in a requirement to supplement income.

One way to gain a better picture of the hidden pool of labour and skills available across the West Midlands would be to conduct primary quantitative research through voluntary sector and educational institutions (which employer feedback suggests also have a high proportion of older workers in part-time roles) as well as other sectors which have less generous and stable pension arrangements.

## 10.4 Summary

- The older workforce took a variety of approaches to providing for themselves in retirement, including occupational pension provision; investing in property; and working after retirement.
- There was some variation in the attitudes and experiences of those who had recently retired and those who were still in employment; those with secure occupational schemes, and those without; and men and women. Older women in particular complained of inadequate pension provision, having relied on their husbands' schemes; while younger women were more proactive about contributing to a pension.
- Rather than a straightforward gender divide, the delineating factor between men and women and retirement planning is the arrival of children and whether (usually) women take more responsibility for caring by going part-time or having a career break. These decisions have implications on pension provision and thus we see more women with shortfalls in pension.
- Discussions about preparing for retirement were mainly based on monetary issues, but there was also a mention of quality of life, exploring voluntary work or part-time work. The older workforce showed little or no awareness of tax concessions allowing them to draw down pensions while in work.
- The main motivation for working after retirement was seen by participants as money, with several participants expressing worries about being able to afford to retire. However, working after retirement was also seen as an antidote to boredom.
- A number of participants were involved in voluntary work in their retirement, while others expressed an interest in looking into voluntary work activities. Some were using voluntary work as a way of easing themselves into retirement; others were looking to make a contribution; while others found voluntary work more satisfying than the paid work they had done.
- Insofar as the current research has located a hidden or latent pool of skills among older workers, beyond the unemployed, there are many who consider voluntary work post-retirement. However, luring this cohort back into the paid workforce presents conundra: first it may render the voluntary sector short of skills and labour; second, this group may have chosen voluntary work over paid work so may not present themselves available for paid work.

- However, voluntary work can also be a route back into paid employment, should older workers wish to return to paid work. Employers from the Charitable/voluntary and Education sectors were the most open to offering part-time roles to people who might be embarking on a second career.

## 11 TRAINING AND LEARNING

Participants from the older workforce had a wide variety of attitudes to, and experiences of, learning. Where participants specified their qualifications, these varied from none, to old-style apprenticeships, CSEs, O levels, A levels, NVQs, Diplomas and Degrees. In line with previous research (see Section 4 – Literature and Policy Review), older worker participants mentioned a number of barriers to training, including cost and perceptions of discrimination, especially from employers. Participants also showed a lack of knowledge about training opportunities and how to find out about them. The incentives and barriers to training and learning mentioned, as well as the extent to which they had engaged in training, are outlined below.

### 11.1 Extent and Types of Training of Older Workers

The majority of participants who had engaged in recent training, had done employer-funded training, generally with larger organisations in the Public, Educational or Health and Social Care sectors. Types of training that older workers said they had experienced included:

- Multi-skill training within the NHS;
- NVQ in care;
- NVQ in education;
- Customer care/customer service training;
- CPD; and
- Health and Safety training.

Self-funded training was mentioned more rarely by participants. Two males had tried learndirect for computer training, one of whom complained that the help he received was inadequate. One female was considering a foundation degree in Business and Administration, but was hesitating because employer funding was not available.

Only a handful of participants had engaged in non-vocational learning including computing (e.g. CLAIT), sewing, sugarcraft, counselling skills and reflexology. Most participants who said they had engaged in non-vocational learning were women. One participant (also a woman) outlined one of the reasons why non-vocational learning was not being undertaken by herself (and probably others):

*“...it would be stupid at our age doing any training because you can’t get a job. I went to a computer course and they weren’t interested in showing me anything because of my age... I went to try and learn the computer, but I wasn’t satisfied [with] the way they were with me. Because I’m older and they all go to the young ones.”*

Female, Retired

Of those participants who talked about their preferred approach to training, the majority preferred ‘hands on’ or learning on the job, while others specified going away to train, going back to college, flexi-study or a combination of ‘hands on’ and formal training.

## 11.2 Incentives and Motivations for Training

A variety of incentives and motivations for training and learning were put forward by participants from the older workforce, including:

- Free, or funded by an employer or the Government.
- Other people motivated to do training as well.
- Learning a new skill.
- As a route into employment.
- Earning a reasonable wage at the end of it.
- Feeling more valued (by employers that train workers).
- Showing initiative to gain skills and becoming more valuable to an employer.

Participants were generally more motivated by courses with a vocational bent or substantive gain as a result of the training:

*“I would consider (training) if I had a job at the end of it.”*  
Male, Unemployed

As previously stated (see *Attitudes to Training* in Section 6 – Incentives and Barriers to Employment), female participants seemed more likely to have undergone retraining or to consider retraining as a means of improving their prospects. This was confirmed by comments from a couple of participants, both male and female:

*“I know from my own experiences that women seem more open to training than men... In my workplace when some training comes up you need to prompt the men!”*  
Female, Service Care Manager

*“...in a lot of cases women are more open to training than men are because men of a certain age think they know their job and think I’m happy as I am, whereas women want to better themselves.”*  
Male, Postman

Participants from the older workforce who had retrained were clear about the benefits of having done so:

*“One thing I will say is at the age we left school and we had to go to a job. We didn’t have the opportunity to go to university. It was never a choice. To actually go back at 40 and to prove to my kids and myself that I can go out and retrain. I can achieve it. I would recommend it, you do benefit.”*  
Female, Finance Co-ordinator

*“I was the oldest person to graduate, and I was very chuffed.”*  
Female, Retired

## 11.3 Barriers to Training

Barriers to training were explored less by participants than barriers to employment, which is indicative that they were more concerned about employment than training, seemingly not recognising that training can be a valuable route to gaining employment or career development. Attitudes of the older workforce to training form a barrier in themselves (see *Attitudes towards Training* in Section 6). A number of

employer respondents also mentioned the resistance to training they perceived amongst older workers (see *Employers' Views about Training and Older Workers* below).

One participant, from the Education sector suggested training by older people for older people might offer a solution to some attitudinal issues:

*“If you’re going to put courses on for people of our age group, have people of our age group teaching us. So they’re going at our pace. I think that’d build your confidence up.”*

Female, Retired Teaching Assistant

Since few participants mentioned the age of the trainer as a barrier, it is uncertain whether older trainers/teachers would have any real effect, although role models for older men in particular might be useful.

### **11.3.1 Employer Attitudes as Perceived by Older People**

A number of participants from the older workforce saw employer attitudes as a barrier to training. In line with the findings about employers in the current research, older workers’ experiences of employers’ approach to training was variable. Some employers (generally in the Public, Educational and Health and Social Care sectors) were mentioned as being very positive in their attitudes to training – sometimes to an extent that outstripped older workers’ motivations to learn! Others did not offer much or any training. This attitude was not seen as necessarily relating to age, but cultural, relating to the whole workforce.

The perceived barriers or reasons why employers may not train older workers, included:

- Older workers may not want to learn, or will not give sufficient return on investment.
- Concerns about training workers, only to see them leave.
- Expense.

One participant talked about employers having tied in clauses for employees so that they have to pay back the cost of a course if they leave within a certain number of months. However, another believed that employers would see a return on investment for training older workers as they would probably stay until they retire.

Older people’s perceptions are that employer attitudes can be a barrier to their gaining training and new skills. Interestingly, a number of employers perceived older workers’ attitudes as a barrier to training. See *Employers’ Views about Training and Older Workers* below.

### 11.3.2 Cost and Time

The cost of training and gaining returns on investment in training were mentioned as barriers by several group participants. Time, especially having to fit training around a full-time job, was also seen as an issue. Perceived barriers relating to cost and time were:

- Expense for companies (especially small companies), or for individuals.
- High cost of training.
- Lack of cheap training for employed people who want to train.
- 'Benefits trap' – losing benefits if you go into education, because you are not available for work.
- Difficulties finding time to train outside of work, especially for workers doing late shifts.
- Difficulties for women to find time, if they have responsibilities caring for a family.
- Being too busy at work, making it hard to find time for training.

The issue of risk and returns on investment attached to retraining was raised by one male:

*"It's catch 22. You're too old to be trained for a certain job, but you need skills behind you to get a certain job and that's true right the way through. You need the skill, but you have to lose money to get the skill and then when you get the skill there's no guarantee you can use the skill because they don't want you."*

Male, Postman

One female participant outlined the barriers related to finding time for training for those in employment:

*"The thing is, if you are in a job, then it's hard to leave the job if you are going to do the training in night school because you can't... and, these days, to me, it's even worse, because my job, I was on lates, most of the time on lates, was like half past 8 to gone 9 o'clock – half past 8 at night. So, no way – and that was like four nights a week – so it's too much... It's hard, you know, if you are in employment, and you want to make yourself better, it's hard to do it."*

Female Afro-Caribbean, Retired

One participant had a suggestion for incentivising employers to offer training to their workforce:

*"Tax relief for firms on training courses and things like that. Especially for smaller firms."*

Male, Chartered Accountant

Many of the time and cost barriers mentioned by participants relate to all age groups, apart from perceived employer fears about return on investment, which could also be said to affect mobile, ambitious young people who have not settled with families and mortgages equally.

### **11.3.3 Transport**

Transport was only mentioned as a barrier to training by the rural Shropshire group. The group mentioned the unreliability of public transport and the cost of fuel. One participant suggested support with transport and costs would encourage people to train.

Older people face a variety of perceived barriers to training and learning including: their own attitudes, employer attitudes, cost, time and transport (in rural areas). While two participants mentioned learndirect, there appears to be generally low awareness of routes into training, especially from the unemployed from more deprived urban areas. Once again, good quality information, advice and guidance would help the over-50s identify suitable training courses, especially for those who are out of work. For the employed, the route to improved training must be via employers – Train to Gain is an initiative to help with this, but employer respondents showed low awareness of the service. Especially for small employers, support with offering training to staff is important. While Train to Gain is undoubtedly gaining ground as an initiative, the LSC and its partners still need to raise awareness further of training initiatives, such as Train to Gain, amongst employers in the West Midlands.

## **11.4 Employers' Views about Training and Older Workers**

Many employer respondents stated that they did not discriminate on grounds of age when selecting who should train. A number of employers said that it was down to the individual as to whether they accessed training (although they were often rather more vague about whether they were offering training.) There was evidence of some variation between employers as to whether they were offering training programmes to staff. Many said that they offered in-house training, but were not always clear about what this might be.

Employers stated that their decisions to train staff were based on a number of factors, generally relating to the job role, including:

- Staff performance and application to their work.
- An individual's desire for qualifications and willingness to learn
- The needs of the business
- Current legislation
- Relevance and cost
- Gaining skills
- Job-related
- Training need (identified through training needs analysis)
- Across the board in-house training for everyone
- The individual's level of experience
- Nomination by line manager for training
- Physical ability to do the role.

Specific types of training mentioned by employers included:

- Manual handling
- Health and Safety
- Customer service

- Time management
- IT skills.

In common with many participants from the older workforce, employers saw training as being firmly job-related, and were usually only prepared to train workers if it was directly relevant to their role. Legislation was also an underlying factor, with a number of employers mentioning Health and Safety training.

Several employers saw older workers' attitudes as an issue when training was on offer. Older workers were perceived as:

- More reluctant to train, especially if bordering on retirement
- Showing fear/insecurity and lack of understanding of the need to train
- Believing that training was unnecessary
- Finding it harder to learn new things.

Other barriers to training mentioned by employers were time and cost. Three employers mentioned Train to Gain as offering support for training.

In many ways, employers' feedback about training and learning is quite similar to that of older worker participants – who mentioned finding it harder to learn and, in some cases, expressed a resistance to training or learning related to change. A couple of employer respondents identified resistance to training from staff who had been in a role for a while, rather than just based on age. Employer respondents in regulated sectors such as Health and Social Care and Education were offering a good deal of training to their workforce and reported resistance in some cases:

*“Some of the people that have been here quite a long time, you may get a resistance. For example, we have got part-time teaching staff who have been here 20+ years and now we are saying you have to do this teaching qualification, and they're saying, 'I'm 63 now, it all seems a bit ridiculous' and we don't have any choice, that's what governs what you do. 37% of new recruits were over 50 in the last quarter.”*

Employer, Large Organisation, Education Sector

*“[There's] quite a lot of fear attached to training, and gaining qualifications. We do need to give a bit more encouragement. Under the national minimum standards, we've got to train our staff by 2010. They have to understand - there's still a certain amount of reluctance - but it's only driven by fear and lack of understanding, and a worry about the amount of support they would get while they are doing that. Offering training is not influenced by the age of a worker. If we've got a worker who, say, was 59 and they were planning to retire, then you have to be sensible about the value of putting that person through 2 years of training.”*

Employer, Large Organisation, Health and Social Care Sector

It seems that employer attitudes to older workers and vice versa are compounding negative attitudes towards the training of older workers. One way out of this impasse is to disseminate good practice and case studies not only showing good practice by employers, but including inspirational examples of older workers and how training has helped both themselves and their employers. The LSC and its partners need to compile such case study and good practice examples and disseminate them through local trade bodies and Chambers of Commerce to employers across the region.

The findings imply that awareness of Train to Gain does still not have high enough recognition amongst employers. From ILR statistics (see Section 5 – Secondary Data Overview) Train to Gain take-up has been meeting and exceeding regional targets. However, there is still more work to be done in raising awareness of the scheme. Only a handful of employers interviewed mentioned the scheme unprompted. The LSC and its partners need to build on their Employer Engagement Strategy to raise the profile of Train to Gain further.

## 11.5 Summary

- Older people had a wide variety of attitudes to and experiences of learning.
- The majority of participants who had engaged in recent training, had done employer-funded training, generally with larger organisations in the Public, Educational or Health and Social Care sectors. Self-funded training was mentioned more rarely by participants. Only a handful of participants had engaged in non-vocational learning such as computing, sewing, sugarcraft, counselling skills and reflexology. Most participants who said they had engaged in non-vocational learning were women.
- Of those who talked about their preferred approach to training, the majority preferred 'hands on' or learning on the job, while others specified going away to train, going back to college, flexi-study or a combination of 'hands on' and formal training.
- A variety of incentives and motivations for training and learning were put forward by participants from the older workforce, including free training, or funded by an employer or the Government; other people motivated to train as well; learning a new skill; as a route into employment; earning a reasonable wage at the end of it; feeling more valued (by employers that train workers); and showing initiative to gain skills and become more valuable to an employer.
- Females seemed more likely to have undergone retraining or to consider retraining as a means of improving their prospects.
- Barriers to training were explored less by participants from the older workforce than barriers to employment, which implies they were more concerned about employment than training. Older people's attitudes to training form a barrier in themselves. A number of employer respondents also mentioned the resistance to training they perceived amongst older workers.
- One proposed approach to encourage older people to train would be to be taught by people of their own age, especially for IT skills, which a number of participants found intimidating.
- Older people face a variety of perceived barriers to training and learning including: their own attitudes, employer attitudes, cost, time and transport.
- While a couple of participants mentioned learndirect, there appears to be generally low awareness of routes into training, especially from the unemployed from more deprived urban areas.
- Many employers stated that they did not discriminate on grounds of age when selecting who should train. There was evidence of some variation between employers as to whether they were offering training programmes to staff.

- Employers stated that their decisions to train staff were based on a number of factors, generally relating to the job role. In common with many older worker participants, employers saw training as being firmly job-related, and were usually only prepared to train workers if it was directly relevant to their role. Legislation was also an underlying factor, with a number of employers mentioning Health and Safety training.
- Barriers to training older workers mentioned by employers were older workers' attitudes, time and cost.
- It seems that employer attitudes towards older workers and vice versa are compounding barriers towards the training of older workers.

## 12 INFORMATION, ADVICE AND GUIDANCE

One of the main findings of this research is that low awareness and little or no experience of careers information, advice and guidance (IAG) for adults was exhibited across all groups of older people, both in and out of employment. In line with the findings of the Literature and Policy Review (see Section 4), the participants had difficulty identifying support agencies that offer IAG and practical help which meets their specific needs. As IAG services move towards the universal adult careers service delivered from Jobcentre Plus offices recommended by the Leitch report, awareness and experience of IAG should rise. The findings from the West Midlands focus groups underline the need for this to happen.

### 12.1 Awareness and Experience of IAG

There was low awareness and little or no experience of IAG across all groups interviewed. This did not vary by gender, ethnicity or economic activity.

#### 12.1.1 The Need for IAG

While awareness and experience of IAG was low, members of several groups, men and women, employed and unemployed, from urban and rural locations across the region, expressed a need for the services that IAG can provide. These included:

- advice and support with interview techniques;
- help with CVs; and
- advice and guidance to develop one's career.

The requirements for support with interviews and CVs were expressed by older people that were not in employment:

*"I was in an interview, and they asked some stupid questions... You get out of the interview technique. What are they interviewing for?"*

Female, Unemployed

*"If I decided to go back to work, I wouldn't know how to start a CV. I've never had to do one – I've had 18 years [with the same employer – they knew my history]."*

Female, Retired

The need for guidance was expressed both by those who were in and out of work:

*"You want to talk to somebody sometimes, and get it all straight so that you know which way to go."*

Female, Unemployed

*"The biggest problem I've had is I've looked for help for somebody to come along and say "this what you've got, this is where you could be, this is how you work towards it" and you can't find that from any trainers or anything – not for somebody my age. I've still got loads of years in me yet hopefully but there's nothing to help you structure that, so you have to go flagging around on your own and do the best you can."*

Female, Mental Health Support Worker

Participants were aware of the services they require to find work and to develop their careers, even if they seem unaware that these are classed as IAG.

### **12.1.2 Sources and Providers of IAG**

Asked about sources of careers information, advice and guidance, older people both in work or out of work mentioned a variety of sources of information including:

- Colleges
- Libraries
- Internet
- Someone in the field of work in which the participant is interested
- Line manager
- learndirect
- Connexions
- Staff agencies
- Citizen's Advice
- Jobcentre.

learndirect was only mentioned by one participant in the context of careers advice. No-one mentioned nextstep. Across all groups, learndirect was only mentioned by three participants, two of them seeing it as a source of training courses rather than careers information and advice.

The Jobcentre was mentioned by several participants across different groups, both those who were working and workless. However, perceptions of Jobcentres were generally negative, especially by older workers who were unemployed (see below).

There was some evidence of limited understanding of IAG by some participants. The Afro-Caribbean group talked about course leaflets; while participants from other groups perceived careers advice as being for young people:

*"I think the general perception is that careers advice is for school leavers. So it's not accessible to people over 25, who are in employment."*  
Male Asian, Chartered Accountant

The overall lack of awareness that older workers are a priority group for IAG services is expressed succinctly by the participant below:

*"They need a – what was it called? The Careers Office, but for grey-haired people."*  
Female, Mental Health Support Worker

Only one participant in all the groups had had experience of IAG as an adult. He had accessed it through Jobcentre Plus:

*"I saw a careers adviser. He was on about changing, going into different things... But I didn't do an apprenticeship to start retraining at my age. I mean, if I was 30 years of age I would gladly go and retrain, you know, but when you're 58 coming up... When you've done three years' retraining, who's gonna employ you then, at 61?"*  
Male, Unemployed

Clearly, some of the issues expressed here are attitudinal on the part of the participant, but targeted, specialist support might have helped improve these perceptions. Some of the views expressed on sources of IAG were also based on limited understanding of IAG by participants.

### **12.1.3 Older Workers' Views about Jobcentre Plus**

Older workers' perceptions of Jobcentres were generally negative. They were seen as places that did not cater well for people in the 50+ age range; that did not offer the types of jobs that people wanted; and that did not offer enough support. Most of these views were expressed by the currently unemployed, or by people who had been unemployed in the past – a group with perhaps a tendency to this view.

The consensus from the group of unemployed participants in the Black Country was that the Jobcentre could do more to help them. Participants said that no-one had received any help with their CVs from the Jobcentre; no-one had been offered additional training and support when they had been unemployed for over six months; and no-one had been offered careers advice, although two participants indicated they knew they could ask for it. One participant, aged 63, said he had been told that due to his age he had no chance of getting a job. Participants from both urban and rural areas of the region had the following to say:

*"I don't know what support you get really. I mean you go down to the Jobcentre. They say, "go and have a look at this job", you come back and say no, they just give you the door and that's it."*

Male, Unemployed

*"[A] lot of people in these Jobcentres, they're just out of school themselves. It's not as if it's people of our age who can give advice."*

Male, Unemployed

*"But you go to the department of employment with these skills and they look at you as if to say "Yes? ...Well we've got a job here, can you sweep floors?" ... they offer you mundane jobs – they do not offer you jobs that apply to the skills you may have. They do not encourage you to increase your skills to another level...It's actually just to get you off a list..."*

Male, Retiree, Now Volunteering

A woman returner (a member of another priority group for IAG) had also had trouble getting support from her local Jobcentre:

*"When I was looking to go back to work, I went to the Jobcentre and I had made an appointment and they forgot I was there. Basically because I was what they called a returner, which meant that they didn't get brownie points for finding me anything. I felt that I was wasting their time and they weren't interested... I certainly wouldn't go to the Jobcentre [for careers information, advice and guidance]. I wouldn't know where to go."*

Female, Finance Co-ordinator

Delivery of IAG through Jobcentres is likely to be effective, especially for the unemployed, given the higher awareness by older workers of Jobcentres' potential roles as a source of IAG. However, older workers' negative perceptions of Jobcentres need to be tackled, by initial marketing, by making use of maturer staff members to support older workers, developing specialist support services for workers

in the 50+ age group, and building up awareness of and access to IAG from the Jobcentres.

## 12.2 Summary

- It is one of the main findings of this research that there was low awareness and little or no experience of careers information, advice and guidance (IAG) for adults across all groups of older workers.
- The older workforce had difficulty identifying support agencies that offer IAG and practical help which meets their specific needs.
- While awareness and experience of IAG was low, members of several groups, men and women, employed and unemployed, from urban and rural locations across the region, expressed a need for the services that IAG can provide, including advice and support with interview technique, help with CVs and careers guidance
- A variety of sources of IAG were suggested by participants. learndirect was mentioned by only one participant in this context, and nextstep by no-one. The Jobcentre was mentioned by several participants across different groups, both those who were working and workless. However, perceptions of Jobcentres were generally negative, especially by older workers who were unemployed.
- Jobcentres were seen as places that did not cater well for people in the 50+ age range; that did not offer the types of jobs that people wanted; and that did not offer enough support.
- Delivery of IAG through Jobcentres is likely to be effective, especially for the unemployed, given the higher awareness by older people of Jobcentres' potential roles as a source of IAG. However, older workers' negative perceptions of Jobcentres need to be tackled.

## 13 SUMMARY OF KEY ISSUES AND RECOMMENDATIONS

This section provides a summary of the key issues arising out of the research exercise and includes recommendations which can be taken into consideration for continued development of the strategy and in determining and planning improvements. Recommendations have been formulated based upon the findings from the research exercise and are found at the end of the section.

### 13.1 Summary of Headline Findings

Key findings are presented in Section 13.2 below. This section provides a summary of main headline findings against the project objectives, as well as a summary of findings by older worker and employer types. Please note that the results presented from this qualitative research exercise are not statistically significant, rather they provide a rich vein of data from which to gain a deeper understanding of the older worker and the environment in which they operate.

#### 13.1.1 Headline Findings for the Older Workforce

The table below summarises headline findings of the primary research with older workforce against the project objectives:

**Table 2: Findings about Older Workforce against Project Objectives**

Objectives to Investigate	Findings
Contentment with current employment	Participants' levels of contentment with their current employment varied. Generally attitudes of those in work were more positive than those not in work, though tempered by comments about stress and paperwork in the modern world of work. Motivations for work included money; boredom; socialising; a sense of purpose; progression; and suitable hours.
Future employment aspirations	Participants had a wide variety of aspirations including changing to a new career; returning to a previous expertise; retraining (for a new career); moving roles/progressing within a large organisation; winding down to retirement.
Barriers to employment	A wide variety of barriers towards gaining work or developing careers were mentioned, including the older workforce's own attitudes, some transport issues; employer attitudes, especially in 'younger profile' sectors such as IT; health and caring issues; and discrimination on grounds of gender, ethnicity, age and even postcode.
Knowledge of IAG services	Across all types of participants there was little or no awareness of careers information, advice and guidance (IAG). This is significant, since IAG is key to giving the older workforce support and advice relating to both training and employment. See the recommendations relating to IAG in Section 13.3 below.

Objectives to Investigate	Findings
Training Issues	The majority of participants who had engaged in recent training, had done employer-funded training, generally with larger organisations in the Public, Educational or Health and Social Care sectors. Self-funded training was mentioned more rarely. Only a handful of participants had engaged in non-vocational learning. A variety of motivations for training were put forward by older worker participants. Perceived barriers included employer attitudes, cost, time and transport. Barriers to training older workers mentioned by employers were similar - older workers' attitudes, time and cost.
Self-employment	Most participants were employed, of whom some had considered self-employment. Others were either currently self-employed or had been self-employed in the past. Generally, those who had experience of self-employment were more positive about it than those who had not. Advantages mentioned were freedom to do what you want; earning capacity; and reaping the rewards of hard work. Disadvantages were seen as competition; not having a marketable skill; legislation, tax and paperwork; costs/outlay versus returns on investment; insecurity; lack of company benefits; benefits trap; and long hours.
Retirement and pension planning	Participants had provided for themselves in retirement through occupational pension provision; investing in property and working after retirement. Discussions about preparing for retirement were mainly based on monetary issues, but there was also a mention of quality of life, exploring voluntary work or part-time work. Older worker participants showed little or no awareness of tax concessions allowing them to draw down pensions while in work. The main motivation for working after retirement was seen as money. Working after retirement was also seen as an antidote to boredom.
"Hidden pool of skills"	Insofar as the current research has located a hidden or latent pool of skills among older workers, beyond the unemployed, there are many who consider voluntary work post-retirement. However, luring this cohort back into the paid workforce presents conundra: first it may render the voluntary sector short of skills and labour; second, this group may have chosen voluntary work over paid work so may not present themselves available for paid work.
Awareness of anti-age discrimination law	Both employed and unemployed participants were doubtful as to the efficacy of anti-age discrimination policies and the law relating to the recruitment of older workers. Awareness of anti-age discrimination varied. A majority of unemployed participants were unaware of the legislation, and dubious about its efficacy. While older people in employment seemed more aware of the law, they were equally uncertain about the way that employer practice may change in relation to it.

The tables below show findings about the older workforce by employment status and gender. The current research found few differences by ethnicity and age (comparing feedback from people in their 40s, 50s, and 60s).

**Table 3: Findings by Employment Status**

<b>Employed</b>	<b>Unemployed</b>	<b>Retired</b>	<b>Self-employed</b>
More positive attitudes to work	More negative about finding work	More positive attitudes to work than unemployed	Those previously self-employed more likely to be positive about self-employment
More career aspirations than those out of work	In deprived areas, attitudes to training can be extremely negative	More likely to be involved in voluntary work	
	Low awareness of routes into training		

**Table 4: Findings by Gender**

<b>Female</b>	<b>Male</b>
More open to retraining as a means of career development and more likely to engage in non-vocational learning	Males are less likely to be positive about training
More flexible to enter the changing workplace	For males from traditional industries it can prove difficult to move to the Service sector
Less pension provision amongst older women	
More caring and home-making responsibilities	
Implications of caring for pension provision	

### 13.1.2 Headline Findings for Employers

The table below summarises headline findings of the primary research with employers against the project objectives:

**Table 5: Findings about Employers against Project Objectives**

Objectives to investigate	Findings
Advantages and disadvantages of older workers	Employers taking part in this research were generally positive about the contribution that older people can make to the workforce. Many of the advantages of employing older workers listed by employers matched those mentioned by older people in the focus groups. Advantages perceived by employers included personal qualities, such as loyalty, experience and reliability; existing skills including communication and time management skills; and practical advantages such as retention, less training, fewer family and childcare commitments. Disadvantages of older workers mentioned were fewer than advantages, including: health issues; fitness, especially for physically demanding jobs; reluctance to change or train.
Employers' attitudes to experience vs qualifications	Employer respondents gave varied responses about their requirements for experience and qualifications. A large minority stated that when recruiting they would not alter the balance of requirements for experience and qualifications for older workers. This may be a disadvantage for older workers where qualifications required and desired by employers for a wide range of jobs seem to have risen.
Willingness of employers to actively seek older workers	Employers are addressing recruitment challenges in a variety of ways. However, specifically targeting older workers was not generally seen as a solution by employers.
Policies and practice related to older workers	Implementation of policies and practice relating to age was not consistent across employer respondents. Four fifths of employers interviewed said they were aware of the new legislation about age and employment in the last 2 years. All respondents from medium and large companies were aware of it. In terms of practice related to age, just over a quarter of employers said that the legislation had not made an impact 'on the ground'. In some cases, this was because they believed they already had good practice in place, in others they were rather vague about the implications of the anti-age discrimination law.

There was little difference in the feedback from employers by location, although some employers in rural locations were more likely to mention recruitment problems. The table below summarises findings relating to employers by size and sector.

**Table 6: Findings by Employer Size and Sector**

<b>Employer Size</b>	<b>Employer Sector</b>
Large employers were seen by older workers as offering more benefits	Manufacturers said they faced a shortage of engineers and operatives
Large employers were more likely to have age-related equal opportunities policies and data monitoring, but practice was not directly affected by the existence of such policies.	Employers in sectors with skills shortages/gaps (Health and Social Care; Education and Manufacturing) were more likely to have in-house training programmes
There was variation of employer practice relating to the management of retirement – larger companies were more aware of the issue	Flexible working was more evident in Education, Retail, Charitable/Voluntary and Health and Social Care sectors. Manufacturing contacts indicated the sector was less flexible.
There needs to be greater awareness of the law and of good practice relating to the management of retirement, and other anti-age discrimination practice, especially for smaller companies.	Education and Voluntary sector respondents were most open to offering part-time roles to people embarking on a second career.

## 13.2 Key Issues

### Incentives and Barriers to Employment

- The older workforce mentioned a variety of incentives and motivations to employment and an even wider variety of barriers to employment or career development. There are a wide variety of ‘types’ of people who comprise this older worker group. A one size fits all solution to labour market issues facing this heterogeneous group will not be successful. Tailored solutions based on the issues of particular groups will have more success.
- Attitudes to, and motivations for, employment varied most between those who were in work and those who were not. Among the workless, retired people were more likely to have a more positive attitude towards finding work than the unemployed.
- Generally the attitudes to employment from older people who were in work were more positive than those of the unemployed. However, this positivity was tempered by comments about the modern world of work, in which stress and paperwork seem to abound.
- Several employed participants perceived larger employers to offer more advantages to older workers, including: more structure in progression routes; better policy, including flexible working and job share; more age positive.
- The main motivation underpinning participants’ requirement for work was the need for money or financial security. A number of other motivations for work were expressed by participants, both employed and unemployed, including boredom; socialising; a sense of purpose; progression; suitable hours; and stress reduction.
- Given current demographic trends, employers who wish to target older workers as an important source of labour, should be taking into consideration these other motivations as they seek to attract older workers. These motivations include: work-life balance and factors such as progression and a sense of purpose, and the social aspects of work.
- Participants from the older workforce generally discussed barriers to their career development more than their future employment aspirations. This may be

because in the context of this research, they were more concerned about putting forward issues that in their opinion require changes in regional policy and practice. It may also be that the majority of participants had few aspirations for the future.

- Older workers had a wide variety of aspirations such as changing to a new career; returning to a previous expertise; retraining (to move into a new career); moving roles; progression; and winding down to retirement.
- Overall, participants currently in employment expressed more career aspirations than those without work; and younger participants expressed more ambition to progress than older participants. Women also seemed to be more open to retraining as a means of developing their career.
- Those participants who were out of work and in relatively deprived geographical areas had largely given up hope of returning to work. These people are a latent source of labour but would require a high level of assistance to return to the workforce.
- Participants from the older workforce perceived a wide variety of barriers towards gaining work or developing careers, including their own attitudes<sup>3</sup>; some transport issues; employer attitudes, especially in 'younger profile' sectors such as IT; health and caring issues, the latter especially a barrier for women; and discrimination, on grounds of gender, ethnicity, age and even postcode. While most employer respondents stated that they were not discriminatory in any way, older worker participants were clearly less sure.
- Gender inequality affects old and young. For the older workforce in particular, women seem in some ways to be more flexible and eager to enter the changing workplace, but also may have more reason to do so (less pension provision). While women still seem to be taking on the large proportion of caring and home-making responsibilities, equality in the workplace, including equal pay, may not be achievable. This may affect older women increasingly in the future as they take on the dual burdens of childcare and caring for older relatives. Meanwhile for males coming out of traditional industries, moving into the Service sector can prove difficult.
- Race inequalities affect all ages. For some participants, the issue seemed to focus on past regrets. The scars borne by first generation migrants, may affect their prospects in later life, so that they face a combination of barriers: race, age and, possibly, their own attitudes based on past bad experiences.
- Training as a route into work in different sectors and occupations is one solution to the barriers the older workforce faces, although the attitudes of some older workers could prove intractable relating to training.
- Census data show that almost half (48.8%) of people in the 50-64 age band have no qualifications, compared with 29.3% of all people of working age (16-64). One form of age discrimination to which participants referred relates to their lack of qualifications in comparison with younger people. The move towards 'credentialism' in the labour market, where ever higher qualification levels are sought, can discriminate against the older workforce. With a policy framework setting targets for larger numbers of people being qualified to graduate level, older workers who may be qualified to Level 3 or below are at a disadvantage in a labour market that increasingly specifies the need for graduates. This can mean

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<sup>3</sup> Such as negative attitudes towards training, qualifications, IT, modern stressful work environments and a nostalgic attitude towards declining industrial sectors, such as Manufacturing.

that good practice equality recruitment practices can discriminate against older people.

### **Employer Attitudes, Policy and Practice**

- Implementation of policies and practice relating to age was not consistent across employer respondents in the West Midlands.
- Many participants from the older workforce, both employed and unemployed, were doubtful as to the efficacy of anti-age discrimination policies and the law relating to the recruitment of older workers.
- Employers taking part in this research were generally positive about the contribution that older workers can make to the workforce. This may be because employers willing to take part in the research were more likely to have a positive attitude or good practice and policies relating to age (although by no means all respondents outlined good practice), or because interviewees wished to give positive messages about older workers given the nature of the research. Alternatively the belief and theory propounded by employers may not be matched in practice.
- Employer respondents defined older workers as being either over 50 or over 60, or in a few cases, over 40. Around two thirds of employer respondents were over 40, and so were nearing the over 50s age bracket themselves. As the workforce ages, it is likely that management will age also. While this does not necessarily guarantee a more positive attitude towards older workers, it is likely to influence the way managers view them.
- Many of the advantages of employing older workers listed by employers matched those mentioned by participants in the focus groups. Advantages of older workers perceived by employers included personal qualities, such as loyalty, experience and reliability; existing skills including communication and time management skills; and practical advantages such as retention, less training, fewer family and childcare commitments. Some of these perceived advantages are clearly only true for certain segments of the older workforce.
- Asked about disadvantages of employing older workers, employers had a greater tendency to say that there were none, exhibiting some unease that they might be seen as discriminatory. Disadvantages mentioned were fewer than advantages, including: health issues; fitness, especially for physically demanding jobs; and reluctance to change or train.
- Employers listed a variety of skills gaps / shortages. Employers from the Manufacturing sector across the region were experiencing a shortage of engineers and operatives. This matches the findings of the NESS, which showed skills gaps for technical and practical skills and for skilled trades and operatives in the region as being above the national average.
- Solutions to recruitment difficulties, skills shortages and skills gaps proposed by employers included training (both in-house and external) and, in a minority of cases, recruiting older workers.
- Employer respondents gave varied responses about their requirements for experience and qualifications. A large minority stated that when recruiting they would not alter the balance of requirements for experience and qualifications for older workers. This may be a disadvantage for older workers where qualifications required and desired by employers for a wide range of jobs seem to have risen.

- Employers said that they were looking for the following types of experience and qualifications, such as personal qualities; professional qualifications/degree for professionals and skilled trades; skills and experience for non-professional roles; literacy and numeracy skills; and industry sector experience.
- Employers with in-house training programmes (usually in sectors with skills shortages/gaps, such as Health and Social Care, Education and Manufacturing) generally regarded qualifications as being less important at the recruitment stage, as qualifications could be gained on the job. In-house and other training offered by employers included NVQs (usually Level 2 and 3), Apprenticeships, and Health and Safety training.
- Employers, especially those in sectors with skills shortages, seemed reasonably pragmatic in their approach to the balance between qualifications and experience required when recruiting. Candidates with both are the ideal, but employers recognised that such candidates are often in short supply.
- Perceptions relating to the training and employment of older workers varied between employers and older workers. Both cohorts were positive about older workers' timekeeping, attendance and experience. However, older workers thought (although only marginally so) that employers believe that training older workers gives a limited return on investment, while employers disagreed with this statement. Older workers also believed that older workers want higher salaries, while employers did not.
- There is evidence that organisational size affects the likelihood of the existence of age-related employment policy and data monitoring. The larger the company, the more likely it will have an equal opportunities policy mentioning age and that age data will be monitored to identify discrimination.
- There is no relationship, however, between the proportions of older workers on the workforce and size of organisation. Practice may not be directly affected by the existence of formal policies relating to age although further research would be needed to verify this.
- There was overt little evidence in our research of a division between public and private sectors in relation to recruitment policy and practice, as some national studies have previously found (McNair, Flynn and Dutton, 2007). Respondents from Health and Social Care, Education and the Voluntary/Charitable sectors were generally clear about policies and practice, but so were representatives from private sector organisations in Manufacturing and other sectors. Overall, size seems to be the determining factor relating to the likelihood of having policies relating to age.
- Annual Population Survey statistics show that there the largest proportion of workers in the West Midlands (27.6%) and the largest proportion of workers aged 50 and over (30.6%) are employed in the Public Administration, Education and Health sector. Annual Business Inquiry statistics reveal that this sector expanded between 2002 and 2006, which means that the sector could provide older workers with greater opportunities for employment.
- A number of employers stated that they were having problems with recruitment. This applied more to employers who were in rural locations, or who required a large number of seasonal casual workers, such as the Agricultural sector.
- Employers were addressing recruitment challenges in a variety of ways including networking; providing flexible hours; offering relevant training and induction to new staff; training existing employees for new roles; recruitment advertising (and

better targeting of advertising); using contract staff; using recruitment agencies; and using foreign workers.

- Specifically targeting older workers does not generally seem to be seen as a solution by employers. Some employers saw recruiting older workers as a means of closing skills gaps, but the vast majority did not perceive recruiting older workers as a solution to their HR issues.
- Awareness of anti-age discrimination was varied amongst both older workers and employers. A majority of unemployed participants were unaware of the legislation, and dubious about its efficacy. While participants in employment seemed more aware of the law, they were equally uncertain about the way that employer practice may change in relation to it.
- Four fifths of employers interviewed said they were aware that there had been new legislation about age and employment in the last 2 years. All respondents from medium and large companies were aware of the new legislation.
- In terms of practice related to anti-age discrimination legislation and policies, just over a quarter of employers said that the legislation had not made an impact 'on the ground'. In some cases, this was because they believed they already had good practice in place, in others they were rather vague about the implications of the anti-age discrimination law.
- The research also revealed some examples of good practice by employers relating to age, such as providing a support team to explain pensions and benefits to staff approaching retirement; phasing down to retirement; flexible working; job share; shift swapping and grandparents' leave.
- Implemented changes mentioned by employers related to anti-age discrimination law and/or policy, included not asking for age on application forms; equality impact assessments; flexible working; writing to people approaching 65 to give them a choice about retirement; more formalised practice (in situations where practice was good already); and changes to sick pay and pension contribution policy.
- The majority of employer respondents stated that their organisation had an official retirement age, mainly of 65 or SPA. The remainder said they had no set retirement age. It was seen as an individual's choice when they retired, so long as they were fit and capable of doing the role. Over half of employers cited examples of employees who had stayed on beyond state pension age, in a wide variety of roles, including managerial, administrative and manual.
- There is evidence of variation in employer practice, especially by size, relating to the management of retirement. Some employers are still unaware of the law relating to the management of retirement, and only a few employers interviewed seemed to have 'gone the extra mile' in supporting older workers as they enter retirement.
- There needs to be greater awareness of the law and of good practice relating to the management of retirement, and other anti-age discrimination practice, especially for smaller companies.

## **Alternative Working Patterns and Self-Employment**

- Participants from several of the groups touched on the benefits of alternative working patterns for their lives. Some group members were already employed in a part-time or voluntary capacity. An interest in part-time working was expressed across all ethnic groups that participated and by both men and women. Their preferences included flexi-hours; part-time working and job share
- Only a few older worker participants had experienced flexi-time in their workplaces. Of the employers interviewed just over a quarter mentioned some form of flexible hours or working for staff. Of these organisations all but one were medium-sized to large. The offer of flexible working for staff is not dependent on the age of the worker, rather is based on the type of business or the sector in which it is operating.
- The feedback from employers implies that flexible working practices are far from uniform. Respondents showing awareness of flexible working were typically from sectors such as Education, Retail, Charitable/Voluntary and Health and Social Care. Respondents from Construction, Leisure and the Legal profession also mentioned flexibility. Manufacturing respondents indicated that working practices in their sector were less flexible.
- Some employers do offer flexible and part-time working to their staff, but older workers seeking alternative working patterns may need to consider the sectors and sizes of company that they apply to carefully. There may sometimes be a mismatch between the experience and background of older workers and the sectors that are offering the working patterns they may be seeking.
- For those employers wishing to retain their older workers but who may not have immediate part-time positions or flexible hours, the introduction of job carving could be a solution.
- A higher proportion (11.8%) of people in the 50 to SPA age bracket are self-employed, compared with the proportion of all those of working age, 16-SPA, (8.3%).
- The majority of participants in the focus groups were employed, of whom some had considered self-employment. Others were either currently self-employed or had been self-employed in the past. Generally, those who had experience of self-employment were more positive about it as an option than those who had not.
- The advantages of self-employment were seen by participants as freedom to do what you want; earning capacity; and reaping the rewards of hard work.
- Participants from all groups were quicker to point out the disadvantages of self-employment than its advantages. Most of the disadvantages were mentioned by those who had never been self-employed, so these may be seen as an attitudinal barrier to self-employment.
- The disadvantages of and barriers to self-employment given by participants were competition; not having a marketable skill; legislation, tax and paperwork; costs/outlay versus returns on investment; insecurity; lack of company benefits; benefits trap; and long hours.

## Financial Provision for Retirement

- Participants from the older workforce provided for themselves in retirement, through occupational pension provision; investing in property; and working after retirement.
- There was some variation in the attitudes and experiences of those who had recently retired and those who were still in employment; between those with secure occupational schemes, and those without; and between men and women. Older women in particular complained of inadequate pension provision, having relied on their husbands' schemes; while younger women were more proactive about contributing to a pension.
- Rather than a straightforward gender divide, the delineating factor between men and women and retirement planning is the arrival of children and whether (usually) women take more responsibility for caring by going part-time or having a career break. These decisions have implications on pension provision, and thus we see more women with shortfalls in pension.
- Discussions about preparing for retirement were mainly based on monetary issues, but there was also a mention of quality of life, exploring voluntary work or part-time work. Older worker participants showed little or no awareness of tax concessions allowing them to draw down pensions while in work.
- The main motivation for working after retirement was seen by participants as money, with several participants expressing worries about being able to afford to retire. However, working after retirement was also seen as an antidote to boredom.
- A number of participants were involved in voluntary work in their retirement, while others expressed an interest in looking into voluntary work activities. Some were using voluntary work as a way of easing themselves into retirement; others were looking to make a contribution; while others found voluntary work more satisfying than the paid work they had done.
- Insofar as the current research has located a hidden or latent pool of skills among the older workforce, beyond the unemployed, there are many who consider voluntary work post-retirement. However, luring this cohort back into the paid workforce presents conundra: first it may render the Voluntary sector short of skills and labour; second, this group may have chosen voluntary work over paid work so may not present themselves available for paid work.
- However, voluntary work can also be a route back into paid employment, should older people wish to return to paid work. Employers from the Charitable/voluntary and Education sectors were the most open to offering part-time roles to people who might be embarking on a second career.

## Training and Learning for the Older Workforce

- Older worker participants had a wide variety of attitudes to and experiences of learning.
- The majority of participants who had engaged in recent training, had done employer-funded training, generally with larger organisations in the Public, Educational or Health and Social sectors. Self-funded training was mentioned more rarely. Only a handful of participants had engaged in non-vocational learning including computing, sewing, sugarcraft, counselling skills and reflexology. Most participants who said they had engaged in non-vocational learning were women.
- Of those participants who talked about their preferred approach to training, the majority preferred 'hands on' or learning on the job, while others specified going away to train, going back to college, flexi-study or a combination of 'hands on' and formal training.
- A variety of incentives and motivations for training and learning were put forward by participants, including free training, or funded by an employer or the Government; other people motivated to train as well; learning a new skill; as a route into employment; earning a reasonable wage at the end of it; feeling more valued (by employers that train workers); and showing initiative to gain skills and become more valuable to an employer.
- Female participants seemed more likely to have undergone retraining or to consider retraining as a means of improving their prospects. Figures for men and women in the West Midlands undertaking LSC funded learning in 2007/8 show that 60.1% of learners are women, compared with 39.9% of men.
- Barriers to training were explored less by participants from the older workforce than barriers to employment, which implies they were more concerned about employment than training. Older workers' attitudes to training form a barrier in themselves. A number of employer respondents also mentioned the resistance to training they perceived amongst older workers. LSC ILR statistics for 2007/8 show that the proportions of learners over 40 reduce with age. Of the 104,894 learners aged 40 and above in the West Midlands, 28.6% are aged 40-44 years: aged 45-49 (22.9%); aged 50-54 (16.7%); aged 55-59 (12.7%); aged 60-64 (8.4%); aged 65-69 (4.9%); and aged 70 and above (5.8%).
- Older workers face a variety of perceived barriers to training and learning including their own attitudes, employer attitudes, cost, time and transport (in rural areas).
- There appears to be generally low awareness of routes into training, especially from the unemployed from more deprived urban areas.
- Many employer respondents stated that they did not discriminate on grounds of age when selecting who should train. There was evidence of some variation between employers as to whether they were offering training programmes to staff.
- NESS statistics show that total training expenditure in the West Midlands region is slightly lower than the English national average: a mean per training establishment of £38,100 in the West Midlands compared with £39,700 in England, equating to £2,450 per trainee in the West Midlands compared with £2,775 per trainee in England.
- Employers stated that their decisions to train staff were based on a number of factors, generally relating to the job role. In common with many older worker

participants, employers saw training as being firmly job-related, and were usually only prepared to train workers if it was directly relevant to their role. Legislation was also an underlying factor, with a number of employers mentioning Health and Safety training.

- Barriers to training older workers mentioned by employers were older workers' attitudes, time and cost.
- It seems that employer attitudes towards older workers and vice versa are compounding barriers towards the training of older workers.

### **Information, Advice and Guidance**

- It is one of the main findings of this research that there was low awareness and little or no experience of careers information, advice and guidance (IAG) for adults across all groups of older workers.
- In line with the findings of the Literature and Policy Review (see Section 4), the older workers interviewed had difficulty identifying support agencies that offer IAG and practical help which meets their specific needs.
- While awareness and experience of IAG was low, members of several groups, men and women, employed and unemployed, from urban and rural locations across the region, expressed a need for the services that IAG can provide, including advice and support with interview technique, help with CVs and careers guidance
- A variety of sources of IAG were suggested by participants. Learndirect was mentioned by only one person in this context, and nextstep by no-one. The Jobcentre was mentioned by several participants across different groups, both those who were working and workless. However, perceptions of Jobcentres were generally negative, especially by older workers who were unemployed.
- Jobcentres were seen as places that did not cater well for people in the 50+ age range; that did not offer the types of jobs that people wanted; and that did not offer enough support.
- Delivery of IAG through Jobcentres is likely to be effective, especially for the unemployed, given the higher awareness by older workers of Jobcentres' potential roles as a source of IAG. However, older workers' negative perceptions of Jobcentres need to be tackled (see Rec 16).

## **13.3 Recommendations**

The recommendations based on the findings from the research are presented below.

### **Employer Attitudes and Practice**

1. Given current demographic trends, employers who wish to target older workers as an important element of their workforce, should be taking into consideration older workers' motivations, including: work-life balance and factors such as progression and a sense of purpose, and the social aspects of work. The LSC and its partners should disseminate the findings of this research to employers regionally, via suitable events and trade bodies, including local Chambers of Commerce.
2. Identifying 'Age Positive' employers in the West Midlands would be very helpful for the over 50s looking for work. The LSC and its partners need to encourage

more employers in the West Midlands to become Age Positive Employer Champions, sharing good practice with employers across the region.

3. The LSC could encourage local authorities and other Public sector organisations with commissioning and buying power to adopt a supply chain initiative to contract with 'age positive' employers.
4. Employers listed a variety of skills gaps. Employers from the Manufacturing sector across the region were experiencing a shortage of engineers and operatives. This matches the findings of the NESS, which showed skills gaps for technical and practical skills and skilled trades and operatives as being above the national average. Work-based learning and refresher training for the over 50s is a solution to help 'plug' these skill gaps. While training is offered as part of New Deal 50 plus<sup>4</sup>, no older worker or employer participants showed any awareness of this. Awareness needs to be raised both among employers and older workers of what New Deal 50 plus offers.
5. Employers are more likely to respond positively to the benefits of employing older workers, especially the practical advantages for their workplace, than to information about population demographics (of which they made little or no mention and showed no interest). For this reason, it might be more productive to stress the advantages of employing older workers to employers across the region rather than communicating issues around the changing demographics of the workforce. Disseminating the findings of this research through publications and websites of trade bodies and Chambers of Commerce is one way of doing this (see Rec. 1)
6. Smaller companies in particular need to increase their awareness of the law and of good practice relating to the management of retirement, and other anti-age discrimination practice. One good route would be to disseminate case studies and articles about good practice to employers across the region.

### **Self-Employment**

7. Given the regional priority to generate more new businesses, and the recognition of the contribution that the over 50s can make to this, it is important to tackle negative perceptions of self-employment among the older workforce and emphasise the flexibility of self-employment. Jobcentre Plus could play a key role in signposting older workers to organisations such as Business Link. There needs to be investment in holistic support services for the over 50s, giving them the opportunity to consider not only employment, but self-employment as a route back into work.
8. Identification of the most likely older worker candidates for success in self-employment requires an understanding of the different typologies of older workers and their problems plus an understanding of the returns available in the labour market, particularly important for some older workers. Training tools and resources would need to be made available for specialist IAG staff.

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<sup>4</sup> New Deal 50 plus gives help and advice to people aged 50 who have not been in employment for over 6 months. Participants have a personal adviser, and can receive a working tax credit or training grant once in work. They can also be supported by a mentor.

### **Training and Learning for the Older Workforce**

9. One proposed approach to encourage the older workforce to train is the use of older people to train their peers. Being taught certain skills, such as IT, by a peer would reduce the feelings of intimidation expressed by participants.
10. To help the older workforce identify suitable training courses, good quality information, advice and guidance is needed, especially for those who are out of work. Ensuring IAG practitioners are informed about the diverse and complex needs of this group is therefore important. E-updates from the Regional Skills Partnership and West Midlands Regional Observatory should include information relating to the older workforce, including detailed LMI; resources for working with the over-50s; case studies; details of support services for the older workforce (e.g. New Deal for the over 50s); and issues such as retirement rights.
11. For the employed, the route to improved training must be via employers. The West Midlands region has been successfully implementing its Employer Engagement strategy, including the Train to Gain initiative. This research confirms the importance of targeting smaller companies and those in the Health and Social Care, Wholesale, Retail Trade and Repair and Manufacturing sectors. However, awareness of Train to Gain was low amongst employer respondents, so the LSC and its partners need to build on their Employer Engagement strategy to raise the profile of Train to Gain even further.
12. Regional work-based learning initiatives, including work trials and experience, need to target the unemployed older workforce in addition to young people.
13. The LSC needs to continue to monitor the age profile of learners engaging in Train to Gain, to ensure that adequate proportions of learners are in the 46+ age range.
14. Employer attitudes towards older workers and vice versa are compounding barriers towards the training of the older workforce. One way out of this impasse is to disseminate good practice and case studies not only showing good practice by employers, but including inspirational examples of older workers and how training has helped both themselves and their employers (see Recs. 6 and 10).

### **Information, Advice and Guidance**

15. A solution to the attitudinal barriers amongst the older workforce, and especially the unemployed is better careers information, advice and guidance and tailored specialist support for the over-50s, especially from Jobcentre Plus or via voluntary sector agencies. The older workforce needs support to encourage people to move from declining sectors such as Manufacturing into growth sectors such as Health and Social Care or into the skills gaps in Manufacturing and Construction. The LSC and its partners need to identify and support appropriate voluntary sector projects offering targeted support to people over-50 back into work or self-employment, especially those in the most deprived areas.
16. For unemployed people over 50, information and advice needs to be available from sources additional to online sources (such as phone helplines or face-to-face IAG), as they are less likely to be able to access technology-based information.
17. Delivery of IAG through Jobcentre Plus is likely to be effective, especially for the unemployed, given the higher awareness among older people of Jobcentres' potential role as a source of IAG. However, the older workforce's negative perceptions of Jobcentres need to be tackled, by initial marketing, making use of maturer staff members to support older workers, developing specialist support

services for workers in the 50+ age group, and building up awareness of and access to IAG from the Jobcentres. Training people over 50 as IAG assistants within Jobcentre Plus would be one means of supporting the older workforce.

18. Given the importance of IAG as a support to the older workforce seeking training and employment opportunities, it is important that the LSC monitors closely the effectiveness of new regional IAG services for the over-50s and other groups. Monitoring should include an assessment of the relative effectiveness of phone, face-to-face and online initiatives.
19. The older workforce needs to remain a priority group for the universal Adult Advancement and Careers Service. It is important that their diverse needs and the multiple barriers some face to training and work are recognised. Training of IAG practitioners relating to this group should be a priority. The LSC and IAG organisations need to work in partnership to ensure that the needs of the older workforce remain high on the agenda.

### **Further Issues**

20. A matrix template of which types of people would be suited to self-employment by types of self-employment (occupational/sector and start-up costs/returns) could be developed that could segment the older workforce, this most heterogeneous of groups. Clearly, for those older workers who still have mortgages and debt, setting up a business later in life that has high set-up costs and long returns on the capital may not be ideal. However, for others, especially those with skills that are in short supply, this may be a perfect solution. Due research into the economy and how it is affecting demand for various goods and services also needs to be undertaken so advisers can provide best guidance. Some form of training tool could then be developed for Jobcentre Plus and IAG staff based on such research.
21. A quantification of the hidden pool of labour and skills available across the West Midlands could be undertaken through a sample survey. Primary quantitative research could be conducted through voluntary sector and educational institutions (which employer feedback suggests also have a high proportion of older workers in part-time roles) as well as other sectors which have less generous and stable pension arrangements.
22. Future research could also focus on women returners in the over-50 range. A number of female participants fitted into this category and were struggling to find suitable work, especially given their wish in many cases, to work part-time.

## APPENDICES

## Appendix 1: Secondary Data

Data was analysed from a range of sources including the LSC's Individualised Learner Records for Further Education, Work Based Learning, Train to Gain, Personal and Community Development Learning and European Social Fund contracts. VT Research supplemented data provided by the LSC with publicly available data from Nomis; Office for National Statistics (ONS); the West Midlands State of the Region Report; the National Employer Skills Survey (NESS) 2007; and the National Learner Satisfaction Survey (NLSS) 2007. Data has been presented in age bands (mainly of 5 years): unless labelled otherwise, up to State Pension Age (SPA). In some cases comparisons are made with all people of working age in the West Midlands: working age is defined as 16-64 for men and 16-59 for women, in accordance with SPA (retirement).

### A1.1 Demographics

The first section draws upon data from Mid-Year Population Estimates 2006; Subnational Population Projections 2006; and the Annual Population Survey 2007 to describe the demographics of the West Midlands including data on population, population projections, ethnicity, and health.

#### A1.1.1 Population of the West Midlands

According to the mid-year population estimates for 2006, there are more than 5 million people resident in the West Midlands (5,366,600). The total population of the 'older workforce' age band of 50-64 years is close to 1 million (971,700): 50-54 years (325,800); 55-59 (346,400); and 60-64 years (299,500). Although we have excluded those aged 65 plus from our 'older workforce' band, there is nothing to stop individuals continuing to work beyond 65 years of age, and later data will show that many are in paid employment. This 'retirement' population in the West Midlands is distributed as follows: 65-69 years (247,500); 70-74 years (211,500); 75-80 years (177,600); and 80 years plus (238,900). It is interesting to see that the current 40-44 cohort (401,600), and 45-49 cohort (357,900) are significantly larger than all older 5-year age cohorts.

**Figure 1: Total Population of the West Midlands**

West Midlands	Total		Male		Female	
	n	%	n	%	n	%
<b>Total</b>	<b>5,366,600</b>	<b>100</b>	<b>2,639,300</b>	<b>100</b>	<b>2,727,300</b>	<b>100</b>
<b>Aged 0 to 19</b>	1,350,600	25.2	691,900	26.2	658,700	24.2
<b>Aged 20-39</b>	1,409,300	26.3	707,100	26.8	702,200	25.7
<b>Aged 40-44 years</b>	401,600	7.5	199,400	7.6	202,200	7.4
<b>Aged 45-49 years</b>	357,900	6.7	178,500	6.8	179,400	6.6
<b>Total 50-64 years</b>	<b>971,700</b>	<b>18.2</b>	<b>482,400</b>	<b>18.2</b>	<b>489,300</b>	<b>18.0</b>
<b>Aged 50-54 years</b>	325,800	6.1	162,000	6.1	163,800	6.0
<b>Aged 55-59 years</b>	346,400	6.5	172,700	6.5	173,700	6.4
<b>Aged 60-64 years</b>	299,500	5.6	147,700	5.6	151,800	5.6
<b>Aged 65-69 years</b>	247,500	4.6	120,000	4.5	127,500	4.7
<b>Aged 70-74 years</b>	211,500	3.9	98,700	3.7	112,800	4.1
<b>Aged 75-79 years</b>	177,600	3.3	77,600	2.9	100,000	3.7
<b>Aged 80 +</b>	238,900	4.5	83,700	3.2	155,200	5.7

Source: Mid-year population estimates 2006, Nomis

The table shows there are no significant differences between the age-cohort sizes of men and women of working age, although from age 65-69, the number of women in

each cohort clearly exceeds the number of men, reflecting the longer expected life span for women.

### **A1.1.2 Population Projections**

The following table shows 2006-based long term Sub-National Population Projections (SNPP) for the West Midlands. The table below gives an indication of future trends on population broken down into five year age bands for the period 2006 to 2018.

The population projections predict that the total of the West Midlands will increase by 337,100 between 2007 and 2018. This is a percentage increase of 6.3%.

**Figure 2: Sub-National Population Projections for West Midlands**

	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>All Ages</b>	<b>5,389,900</b>	<b>5,417,300</b>	<b>5,445,900</b>	<b>5,475,900</b>	<b>5,506,400</b>	<b>5,537,400</b>
<b>0-19</b>	1,348,300	1,345,400	1,344,300	1,343,600	1,342,300	1,343,900
<b>20-39</b>	1,406,000	1,407,500	1,408,300	1,411,300	1,405,600	1,420,300
<b>40-44</b>	405,100	407,000	407,000	403,800	400,300	393,500
<b>45-49</b>	366,800	374,500	383,100	392,000	397,700	401,400
<b>50-54</b>	327,800	331,600	335,700	342,100	350,900	360,000
<b>55-59</b>	333,300	324,100	319,400	315,800	315,600	317,800
<b>60-64</b>	317,600	326,800	329,700	330,900	330,300	318,100
<b>65-69</b>	248,700	255,000	263,400	271,600	280,800	298,500
<b>70-74</b>	214,000	218,300	223,500	226,700	226,700	228,400
<b>75-79</b>	178,800	179,500	179,300	180,300	182,300	185,900
<b>80 +</b>	243,400	247,600	252,300	257,700	263,700	269,500
	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
<b>All Ages</b>	<b>5,568,200</b>	<b>5,599,400</b>	<b>5,630,500</b>	<b>5,662,500</b>	<b>5,694,600</b>	<b>5,727,000</b>
<b>0-19</b>	1,347,900	1,353,000	1,359,400	1,366,300	1,372,900	1,381,300
<b>20-39</b>	1,426,700	1,436,500	1,447,200	1,460,000	1,474,600	1,487,200
<b>40-44</b>	383,400	369,800	355,300	339,500	325,300	316,000
<b>45-49</b>	403,300	403,200	400,000	396,600	389,900	380,000
<b>50-54</b>	367,600	376,100	385,000	390,700	394,500	396,300
<b>55-59</b>	321,700	325,800	332,100	340,900	349,800	357,500
<b>60-64</b>	309,400	305,100	301,900	301,800	304,200	308,100
<b>65-69</b>	307,800	311,000	312,500	312,200	300,900	293,000
<b>70-74</b>	234,800	243,000	250,900	259,800	276,700	285,900
<b>75-79</b>	190,700	196,200	199,800	200,500	202,500	208,800
<b>80 +</b>	274,700	279,800	286,400	294,400	303,400	313,000

Source: SNPP 2006, ONS

The 'older workforce' (50-64 age bands) is projected to increase by 83,200 people between 2007 and 2018. This is a percentage increase of 8.5%.

Projections for the 50-54 age range show increases in population year-on-year from 2007 to 2018, from 327,800 to 396,300. This is a total increase of 68,500: the second highest increase for any of the age bands.

The 55-59 age band is projected to decrease each year from 2007 to 2012, then increase each year from 2013 to 2018. By 2015, this age band will have become more populous than in 2007, and by 2018 the net growth in this age band is projected to be 24,200.

A small net decrease of 9,500 is predicted for the 60-64 age band between 2007 and 2018, following several fluctuations in population size. This population increases steadily from 2007 (317,600) to 2010 (330,900), holds stable for one year, then decreases until 2015 (301,900). From 2016, the projections suggest another increase in the population of 60-64 year olds will begin.

### A1.1.3 Ethnicity

The following tables display a break down of ethnicity in the current population of the West Midlands region, and each constituent LSC area.

Of the 4 million 'working age' (16+) residents of the West Midlands 87.8% are recorded as White; 7% as Asian (Indian/Pakistani/Bangladeshi); 2.7% as Black; 2.0% as Other Ethnic Group; and 0.6% as Mixed Ethnicity.

**Figure 3: Ethnicity for All Adults (16+) West Midlands LSC Regions**

	Birmingham & Solihull		Coventry & Warwickshire		Herefordshire & Worcestershire	
	n	%	n	%	n	%
<b>Total 16+</b>	<b>939,500</b>	<b>100</b>	<b>662,900</b>	<b>100</b>	<b>594,400</b>	<b>100</b>
<b>White</b>	665,300	70.8	596,700	90.0	582,000	97.9
<b>Mixed</b>	13,000	1.4	2,500	0.4	500	0.1
<b>Indian</b>	52,800	5.6	31,800	4.8	800	0.1
<b>Pakistani/Bangladeshi</b>	109,300	11.6	4,600	0.7	1,300	0.2
<b>Black</b>	63,800	6.8	11,000	1.7	3,000	0.5
<b>Other Ethnic Group</b>	35,300	3.8	16,300	2.5	6,800	1.1
	Shropshire		Staffordshire		The Black Country	
	n	%	n	%	n	%
<b>Total 16+</b>	<b>358,500</b>	<b>100</b>	<b>853,800</b>	<b>100</b>	<b>857,500</b>	<b>100</b>
<b>White</b>	346,400	96.6	828,200	97.0	726,800	84.8
<b>Mixed</b>	1,100	0.3	1,700	0.2	5,200	0.6
<b>Indian</b>	3,200	0.9	3,400	0.4	56,900	6.6
<b>Pakistani/Bangladeshi</b>	1,700	0.5	9,700	1.1	23,300	2.7
<b>Black</b>	1,300	0.4	4,500	0.5	29,800	3.5
<b>Other Ethnic Group</b>	4,800	1.3	6,300	0.7	15,500	1.8

Source: Annual Population Survey 2007, Nomis

Compared to the other West Midlands LSC areas, Birmingham and Solihull has the highest percentage of a non-white population (29.2%): 17.2% are Asian (Indian/Pakistani/Bangladeshi); 6.8% Black; 3.8% Other Ethnic Group; and 1.4% Mixed Ethnicity.

The Black Country LSC area has the second highest non-white population. 84.8% of population are recorded as White: the remaining 15.2% are described as follows: 9.3% Asian; 3.5% Black; 1.8% Other Ethnic Group; and 0.6% Mixed Ethnicity.

One in ten of the Coventry and Warwickshire LSC area population are recorded as an ethnic group other than White: 5.5% Asian; 2.5% Other Ethnic Group; 1.7% Black and 0.4% Mixed Ethnicity.

Around 1 in 20 residents in the Herefordshire and Worcestershire; Shropshire; and Staffordshire LSC areas are recorded as non-White. The White population in these areas is as follows: Shropshire 96.6%; Staffordshire 97%; and Herefordshire and Worcestershire 97.9%.

A breakdown of the West Midlands population aged 50+ in the 2007 Annual Population Survey is shown in the table below, in comparison with the total adult population of the region.

For the whole population of the West Midlands 87.8% is recorded as White, compared to 94.4% of the 50+ population in the region. The table shows that within the working population Ethnic Minority groups are growing.

For all ages, 7.0% are recorded as Asian (Indian/Pakistani/Bangladeshi) compared to 3.5% of the 50+ population. Residents who are recorded as Black make up 2.7% of the population for all ages and 1.3% of the over 50s population. Residents who are recorded to be in an Other Ethnic Group make up 2.0% of the population for all ages, and 0.8% of the over 50 population. For all ages, 0.6% of residents in the West Midlands are Mixed Ethnicity, as are 0.1% of those aged 50 and over.

**Figure 4: Ethnicity for the West Midlands Over 50s**

	All Ages		Aged 50+	
	n	%	n	%
<b>Total</b>	<b>4,266,600</b>	<b>100</b>	<b>1,818,200</b>	<b>100</b>
<b>White</b>	3,745,400	87.8	1,715,600	94.4
<b>Mixed</b>	24,000	0.6	1,700	0.1
<b>Indian</b>	148,900	3.5	38,000	2.1
<b>Pakistani/Bangladeshi</b>	149,900	3.5	25,700	1.4
<b>Black</b>	113,400	2.7	23,300	1.3
<b>Other Ethnic Group</b>	85,000	2.0	13,900	0.8

Source: Annual Population Survey 2007, Nomis

### **A1.1.4 Health Problems for the Over 50s**

The table below provides data from the 2001 Census on limiting long-term illness in the West Midlands for residents aged 16 and over. Of the 3,288,042 people of working age (16 to 64) in the West Midlands, 14.8% were recorded as having a limiting long-term illness. However, within the 50-64 'older worker' age band, the limiting long-term illness rate is substantially higher, at 27.2% (equating to 935,852 people regionally).

Looking closely at the 'older workers' age-range shows that limiting long-term illness rates increase steadily and rapidly with each 5-year age band. Roughly 1 in 5 aged 50-54; 1 in 4 aged 55-59; and 1 in 3 of those aged 60-64 reported a long-term illness.

**Figure 5: Limiting Long-Term Illness by Age – West Midlands**

	Number of People	Number of People with Limiting Long-Term Illness	Percentage (%) of people with Limiting Long-Term Illness
<b>Total Aged 16 to 64</b>	<b>3,288,042</b>	<b>487,766</b>	<b>14.8</b>
<b>Aged 40 to 44</b>	358,100	46,269	12.9
<b>Aged 45 to 49</b>	331,248	54,806	16.5
<b>Total Aged 50 to 64</b>	<b>935,852</b>	<b>254,994</b>	<b>27.2</b>
<b>Aged 50 to 54</b>	359,318	74,981	20.9
<b>Aged 55 to 59</b>	310,967	85,723	27.9
<b>Aged 60 to 64</b>	265,567	94,290	35.5
<b>Total Aged 65 to 84</b>	<b>728,707</b>	<b>356,687</b>	<b>48.9</b>
<b>Aged 65 to 69</b>	234,370	93,829	42.2
<b>Aged 70 to 74</b>	211,024	97,420	46.2
<b>Aged 75 to 79</b>	172,327	95,264	55.2
<b>Aged 80 to 84</b>	110,986	70,174	63.2

Source: Census 2001, Nomis

### **A1.1.5 Qualification Levels**

Regionally, the APS 2007 suggests that almost one in five (17%) of the working age population of the West Midlands have no formal qualifications (see Figure 6 below). The Black Country has the highest percentage of residents who are recorded as not having any formal qualifications (24.1%) and also the lowest percentage that have qualifications at NVQ level 4 and above (17.4%). With the exception of the Black Country, there is little variation between sub-regions in the proportions with NVQ 3 or higher qualifications.

**Figure 6: Qualification Level at Working Age by LSC Area**

	West Midlands	Birmingham & Solihull	Coventry & Warwickshire	Herefordshire & Worcestershire	Shropshire	Staffordshire	The Black Country
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>None</b>	<b>17.0</b>	18.1	12.6	12.1	12.2	17.2	24.1
<b>NVQ 1</b>	<b>14.2</b>	13.2	12.4	13.5	15.5	15.9	15.2
<b>NVQ 2</b>	<b>17.2</b>	16.3	16.1	17.6	19.1	17.6	17.9
<b>Trade Apprenticeships</b>	<b>3.9</b>	2.9	4.5	4.2	4.1	4.2	4.3
<b>NVQ 3</b>	<b>15.4</b>	15.1	17.5	17.4	16.1	14.7	13.3
<b>NVQ 4+</b>	<b>24.6</b>	25.5	28.6	27.9	28.3	23.8	17.4
<b>Other</b>	<b>7.7</b>	9.0	8.4	7.3	4.7	6.7	7.9

Source: Annual Population Survey 2007, Nomis

Although APS is a sample survey, the recording is perhaps more accurate than that in the Census, and the interviewer-led APS questionnaire is highly detailed, and lists thirty different qualification groups, with further breakdowns of many of these groups. However, APS data for qualifications held by specific age groups within the West Midlands is not readily available, and hence we have also looked at data from Census 2001. The Census question used to derive highest qualification level is simpler than that used by APS, and is open to a greater degree of individuals'

interpretation by the respondent as the form is self-completed (and in many cases completed on behalf of other members of the household. This may go some way to explaining the apparent differences between the datasets in terms of the qualification levels for the region.

Figure 7 below provides a breakdown of the qualification levels of residents in the West Midlands of working age, and for each 5-year age band from 40 to 74 years of age.

For the older working age band of 50-64 years, the percentage of residents recorded with no qualifications is 48.8%; Level 1 (10.4%); Level 2 (10.6%); Level 3 (3.1%); Level 4/5 (14.3%); and other qualifications/level unknown (12.6%).

**Figure 7: Qualification Level by Age Band – West Midlands**

	16-64	40-44	45-49	Total 50-64	50-54	55-59	60-64	65-69	70-74
Total	% 100	% 100	% 100	% 100	% 100	% 100	% 100	% 100	% 100
No Quals	29.3	26.0	33.8	48.8	40.3	49.9	59.2	66.2	71.0
Level 1	18.5	22.5	15.4	10.4	12.9	10.1	7.5	4.1	2.5
Level 2	20.0	20.0	15.8	10.6	13.0	10.4	7.8	7.9	6.8
Level 3	8.2	6.0	5.5	3.1	4.2	2.8	2.0	1.9	2.0
Level 4/5	17.0	19.3	19.2	14.3	16.8	13.4	12.0	10.7	10.1
Other Qual/ Not known	7.0	6.1	10.2	12.6	12.9	13.4	11.5	9.2	7.8

Source: Census 2001, Nomis

Residents who are in the older working age bands in the West Midlands are more likely to have no qualifications, compared to residents in the younger age bands. For example, 40.3% of residents aged 50-54 have no qualifications, as do 49.9% aged 55-59 and 59.2% aged 60-64. A much smaller percentage of residents aged 40-44 (26.0%); and 45-49 (33.8%) are recorded as having no qualifications.

## **A1.2 Economic Activity of the Over 50s**

This section draws upon data from the Annual Population Survey 2007 and Claimant Counts - July 2008, and (for data in 5 year age bands) Census 2001 to create a clear picture of the economic activity and stated reasons for inactivity of the over 50s.

### **A1.2.1 Economic Activity of the Over 50s**

The following table provides a breakdown of economic activity of the West Midlands working (males 16-64; females 16-59) and over 50 populations (males 50-64; females 50-59).

There are over 3 million people of working age in the West Midlands and of this number, 77.1% are economically active: 72.4% in employment (63.8% are employees and 8.3% self-employed) and 4.7% unemployed. Just over a fifth (22.9%) of the working age population of the region are economically inactive.

There are over 800,000 residents in the West Midlands who are aged between 50 and SPA (59/64). The proportion of this age group who are economically active is slightly lower (74.8%) than for all of working age. The unemployment range of the 50-

SPA group is lower than for the working age population as a whole, but this is off-set by a slightly higher rate of economic inactivity.

**Figure 8: Economic Activity, 50-SPA – West Midlands**

	Working Age 16-59/64		Aged 50-59/64	
	n	%	n	%
<b>All People</b>	<b>3,262,700</b>	<b>100</b>	<b>813,500</b>	<b>100</b>
<b>Economically Active</b>	2,516,200	77.1	608,800	74.8
<b>Inactive</b>	746,500	22.9	204,700	25.2
<b>In employment</b>	2,362,900	72.4	586,200	72.1
<b>Employees</b>	2,080,600	63.8	488,800	60.1
<b>Self Employed</b>	269,300	8.3	95,700	11.8
<b>Unemployed</b>	153,300	4.7	22,600	2.8

Source: Annual Population Survey 2007, Nomis

As shown above, there are 204,700 people aged 50-64 who are economically inactive in the West Midlands, their distribution across the LSC areas of the West Midlands is shown below.

**Figure 9: Economic Inactivity for 50-SPA – West Midlands**

	Total	Male	Female
<b>West Midlands</b>	<b>204,700</b>	<b>112,900</b>	<b>91,800</b>
<b>Birm &amp; Solihull</b>	40,900	21,600	19,300
<b>Coventry &amp; Warwicks</b>	23,700	12,300	11,400
<b>Herefords &amp; Worcs</b>	28,100	15,000	13,100
<b>Shropshire</b>	21,000	11,800	9,200
<b>Staffordshire</b>	45,600	25,500	20,100
<b>The Black Country</b>	45,400	26,700	18,700

Source: Annual Population Survey 2007, Nomis

The numbers of economic inactive people in each area is slightly higher for men than for women.

### ***A1.3 Employment of Older Workers***

This section draws upon data from the Annual Population Survey 2007, the Annual Survey of Hours and Earnings 2007, and (for data in 5 year age bands) Census 2001 to illustrate the type of work that older workers are engaged in.

#### ***A1.3.1 Occupations by Age Band***

According to Census 2001, the occupations of the 2,272,461 workers aged 16 to 64 years in the West Midlands broke down as follows:

- 14.2% Managers and Senior Officials;
- 13.4% Skilled Trades Occupations;
- 13.1% Elementary Occupations;
- 12.9% Administrative and Secretarial Occupations;
- 12.2% Associate Professional and Technical Occupations;
- 11.0% Process, Plant and Machine Operatives;
- 10.1% Professional Occupations;
- 7.5% Sales and Customer Service Occupations; and
- 6.8% Personal Service Occupations.

Of the 565,795 workers in the West Midlands within the older worker age bracket of 50-64 years, the largest proportion in the 50-54 and 55-59 age brackets were employed in Managerial and Senior Official occupations: 16% and 14.8% respectively. The largest proportion (17.2%) of workers aged 60-64 were employed in Skilled Trades occupations.

Workers in Skilled Trade occupations made up the second largest proportion of workers in the 50-54 (13.5%) and 55-59 (14.6%) age bands. Workers in Elementary occupations made up the second largest proportion of workers aged 60-64 (17.1%) years.

Across the older worker age bracket, Sales and Customer Service occupations made up the smallest proportion of workers: aged 50-54 (5.6%); aged 55-59 (5.8%); and aged 60-64 (5.1%).

It appears that workers are retiring earliest from manager and senior official occupations and professional occupations, but are remaining in employment longest in Skilled Trades, Elementary and Process/Plant/Machine Operative occupations.

**Figure 10: Occupation by Age Bands – West Midlands**

	16-64	50-54	55-59	60-64	65-69	70-74
<b>Base</b>	<b>2,272,461</b>	<b>269,442</b>	<b>197,843</b>	<b>98,510</b>	<b>24,655</b>	<b>10,453</b>
	%	%	%	%	%	%
<b>Managers &amp; Snr Officials</b>	14.2	16.0	14.8	13.4	15.6	16.6
<b>Professional Occupations</b>	10.1	11.6	9.4	8.6	10.1	11.2
<b>Assoc Prof &amp; Tech</b>	12.2	9.9	8.8	8.1	8.2	7.3
<b>Admin &amp; Secretarial</b>	12.9	13.2	12.9	10.1	11.1	10.9
<b>Skilled Trades</b>	13.4	13.5	14.6	17.2	15.7	16.3
<b>Personal Service</b>	6.8	6.2	6.4	5.7	4.8	4.7
<b>Sales and Cust Service</b>	7.5	5.6	5.8	5.1	5.7	5.7
<b>Process/Plant/Machine Ops</b>	11.0	12.0	13.1	14.6	9.8	8.4
<b>Elementary Occupations</b>	13.1	12.0	14.1	17.1	18.9	19.0

Source: Census 2001, Nomis

Some people continue to work beyond 64 years of age and the table shows that the Census recorded 35,108 people aged between 65 and 74 in the West Midlands who remained in paid employment. It can be seen that workers who continue to work beyond retirement age in the West Midlands are more likely to be employed in Elementary Occupations, Skilled Trades and as Managers and Senior Officials than workers aged 16-64 years.

### A1.3.2 Industry by Age Band

The table below provides a breakdown of the industries in which people of working age (16-SPA) and older workers (aged 50 and over) in the West Midlands are recorded as working in.

The largest proportion of all workers in the West Midlands (27.6%) are employed in the Public Administration, Education and Health sector. This sector also employs the largest proportion of workers aged 50 and over: 30.6%. Distribution, Hotels and Restaurants accounts for almost a fifth (18.7%) of all employment, but only 15.6% of the older workforce. Generally there is little difference between the industrial sector in which older workers are employed and workers of all ages.

**Figure 11: Industry by Age Band - West Midlands**

	Workers 16-SPA		Workers 50+	
	n	%	n	%
<b>Total</b>	<b>2,352,300</b>	<b>100</b>	<b>693,800</b>	<b>100</b>
<b>Agriculture and fishing</b>	26,100	1.1	10,200	1.4
<b>Energy and water</b>	26,300	1.1	6,400	0.9
<b>Manufacturing</b>	405,300	17.2	134,000	19.3
<b>Construction</b>	186,100	7.9	47,700	6.9
<b>Distribution, hotels and restaurants</b>	439,500	18.7	108,100	15.6
<b>Transport and communications</b>	162,400	6.9	47,100	6.8
<b>Banking, finance and insurance, etc</b>	332,900	14.2	89,200	12.9
<b>Public administration, education &amp; health</b>	649,200	27.6	212,400	30.6
<b>Other services</b>	124,500	5.3	38,700	5.6

Source: Annual Population Survey 2007, Nomis

### A1.3.3 Full- and Part-Time Workers

The table below shows that there are more than 2 million people aged 16 to SPA in the West Midlands who are in paid employment and that just under 700,000 of these are workers aged 50 years and above.

Overall, 76.7% of the region's employees work full-time, compared with 68.2% of workers aged 50 and above.

**Figure 12: Full- and Part-Time Workers - West Midlands**

	All Workers (aged 16-SPA)		Workers Aged 50+	
	n	%	n	%
<b>Total</b>	<b>2,361,400</b>	<b>100</b>	<b>695,500</b>	<b>100</b>
<b>Male Full-Time</b>	1,196,000	50.6	330,300	47.5
<b>Female Full-Time</b>	615,500	26.1	144,100	20.7
<b>Male Part-Time</b>	120,700	5.1	60,800	8.7
<b>Female Part-Time</b>	429,200	18.2	160,300	23.0

Source: Annual Population Survey 2007, Nomis

Part-time workers make up 23.3% of all employees in the West Midlands, whilst 31.7% of workers aged 50 and over are employed part-time. More women than men work part-time.

Across both age groups, the percentage of men working full-time is higher than the percentage of women working full-time. 90.8% of all male workers are reported as working full-time, whilst 58.9% of all female workers are reported as working full-time.

More than four fifths (84.5%) of men aged 50 and over work as full-time workers, compared with half (47.3%) of women of comparable ages.

### A1.3.4 Pay Rates

The table below shows the gross median hourly pay for all employee jobs in the United Kingdom, broken down by age. Hourly pay rates can be seen to increase with age up to a peak at 30-39 years (£11.87). The level of hourly pay then shows a small decline for workers aged 40 and above: 40-49 years (£11.56); 50-59 years (£10.75); and 60 years and above (£8.95).

**Figure 13: Hourly Pay by Age**

	United Kingdom	
	Number of jobs (thousand)	Median (£ pa)
<b>All Employees</b>	<b>23,913</b>	<b>£10.22</b>
<b>16-17</b>	343	£4.91
<b>18-21</b>	1,481	£6.25
<b>22-29</b>	3,893	£9.26
<b>30-39</b>	5,693	£11.87
<b>40-49</b>	6,345	£11.56
<b>50-59</b>	4,702	£10.75
<b>60 and above</b>	1,550	£8.95

Source: Annual Survey of Hours and Earnings, 2007 ONS

Figures for 16 to 17 year olds include employees not on adult rates of pay.

Figures for Number of Jobs are for indicative purposes only and should not be considered an accurate estimate of employee job counts.

As shown in the table below, data is also available for the gross median hourly pay for all employee jobs in England and the West Midlands (without age breakdowns). For all employee jobs in England the median hourly pay is £10.37: the median hourly pay in the West Midlands is lower, at £9.64. Male workers in England have an hourly median pay of £11.80: male workers in the West Midlands have an hourly median pay of £10.91. The median hourly pay rate for female workers in England is £9.04, whilst female workers in the West Midlands have a median hourly pay of £8.45. For all full-time workers the hourly median salary in England is £11.58, and £10.63 in the West Midlands. The median hourly pay-rate for part-time workers is lower than for full-time workers: £7.33 in England and £7.03 in the West Midlands.

**Figure 14: Hourly Pay for Full- and Part-Time Jobs**

	England		West Midlands	
	Jobs (thousand)	Median (£ pa)	Jobs (thousand)	Median (£ pa)
<b>All</b>	19,610	£10.37	2,080	£9.64
<b>Male</b>	9,983	£11.80	1,057	£10.91
<b>Female</b>	9,627	£9.04	1,023	£8.45
<b>Full-time</b>	14,415	£11.58	1,515	£10.63
<b>Part-time</b>	5,194	£7.33	565	£7.03
<b>Male Full-time</b>	8,839	£12.27	939	£11.29
<b>Female Full-time</b>	5,576	£10.55	576	£9.72
<b>Male Part-time</b>	1,143	£7.26	118	£6.83
<b>Female Part-time</b>	4,051	£7.34	447	£7.08

Source: Annual Survey of Hours and Earnings, 2007 ONS

Employees on adult rates whose pay for the survey pay-period was not affected by absence.

Figures for Number of Jobs are for indicative purposes only and should not be considered an accurate estimate of employee job counts

The median hourly pay for male full-time workers is £12.27 in England and £11.29 in the West Midlands. Full-time female workers in England earn an average hourly pay of £10.55 and in the West Midlands £9.72.

In England the average annual salary for a male part-time worker is £7.26 and in the West Midlands this is £6.83. The average annual salary for a female part-time worker is £7.34 and in the West Midlands this is £7.08.

## **A1.4 Training, Learning and Qualifications of the Over 50s**

The following data has been taken from the National Learner Satisfaction Survey (NLSS) 2007. The NLSS is a large-scale tracking survey of LSC-funded learners who are aged 16 and over. Data is collected on learner perceptions and learner satisfaction, via telephone interviews with over 43,000 learners.

### **A1.4.1 Older Learners in the West Midlands**

Individualised Learner Records (ILR) are collected by all learning providers receiving funding for learners from the LSC. The dataset includes information about the demographics, qualification level, and learning aims of all LSC funded learners in FE, Work-Based Learning, and other settings.

Data for the West Midlands shows that there are over 50,000 learners who are aged between 50 and 84 years. A breakdown by LSC area shows that 24.8% of these learners are from the Black Country: 20.9% (Birmingham and Solihull); 16.8% (Staffordshire); 14.6% (Coventry and Warwickshire); 13.7% (Herefordshire and Worcestershire); and 9.3% (Shropshire).

There are a total of 24,450 Further Education (FE) learners in the West Midlands who are aged 50 to 84 years: 22.0% from Birmingham and Solihull; 20.4% from The Black Country; 18.3% from Herefordshire and Worcestershire; 14.8% Coventry and Warwickshire; 14.6% Staffordshire; and 9.8% from Shropshire.

There are 175 Work-Based Learners (WBL) in the West Midlands who are aged 50 to 84 years: 31.4% from Staffordshire; 19.4% from Coventry and Warwickshire; 18.3% from Birmingham and Solihull; 16.6% from The Black Country; 12.6% from Herefordshire and Worcestershire; and 1.7% from Shropshire.

**Figure 15: Learner Populations 2007/08 Aged 50-84**

	Total	FE	WBL	TTG	PCDL	ESF
	n	n	n	n	n	n
<b>West Midlands</b>	<b>50,855</b>	<b>24,450</b>	<b>175</b>	<b>7,441</b>	<b>10,434</b>	<b>8,355</b>
<b>Birm &amp; Solihull</b>	10,616	5,373	32	1,387	1,976	1,848
<b>Coventry &amp; Warwicks</b>	7,424	3,623	34	925	1,615	1,227
<b>Herefords &amp; Worcs</b>	6,959	4,474	22	972	572	919
<b>Shropshire</b>	4,716	2,405	3	600	621	1,087
<b>Staffordshire</b>	8,526	3,575	55	1,636	2,198	1,062
<b>The Black Country</b>	12,614	5,000	29	1,921	3,452	2,212

Source: West Midlands LSC Individualised Learner Records, 2007/8

There are 7,441 learners in the West Midlands aged between 50 and 84 years who are on Train to Gain courses. A breakdown for the West Midlands areas is as follows: The Black Country (25.8%); Staffordshire (22.0%); Birmingham and Solihull (18.6%);

Herefordshire and Worcestershire (13.1%); Coventry and Warwickshire (12.4%); and Shropshire (8.1%).

Within the West Midlands there are 10,434 learners aged 50 to 84 years who are taking Personal and Community Development Learning (PCDL) Courses. A breakdown of learners in each of the West Midlands areas is as follows: The Black Country (33.1%); Staffordshire (21.1%); Birmingham and Solihull (18.9%); Coventry and Warwickshire (15.5%); Shropshire (6.0%); and Herefordshire and Worcestershire (5.5%).

There are 8,355 learners in the West Midlands who are aged 50 to 84 years who are taking European Social Fund (ESF) courses. Of this number, 26.5% are from The Black Country: Birmingham and Solihull (22.1%); Coventry and Warwickshire (14.7%); Shropshire (13.0%); Staffordshire (12.7%); Herefordshire and Worcestershire (11.0%).

### **A1.4.2 Demographic Profile of Older Learners**

The table below shows that there are 104,891 learners aged 40 and above in the West Midlands. Of this number, 28.6% are aged 40-44 years: aged 45-49 (22.9%); aged 50-54 (16.7%); aged 55-59 (12.7%); aged 60-64 (8.4%); aged 65-69 (4.9%); and aged 70 and above (5.8%).

Across all types of learning the majority of learners are aged 40-44 years: FE (29.3%); WBL (44.6%); Train to Gain (33.9%); PCDL (13.2%); and ESF (32.2%).

A look at the older worker age groups (50-64 years) shows that for FE learners in the West Midlands in 2007/08, 15.8% are aged 50-54 years: 11.9% aged 55-59 years; and 8.7% aged 60-64 years.

For learners who are taking Work-Based Learning courses in the West Midlands in 2007/08, 16.9% are aged 50-54 years; 6.6% are aged 55-59 years; and 1.9% are aged 60-64 years.

**Figure 16: Learners by Age 40 and Over**

	<b>FE</b>	<b>WBL</b>	<b>TTG</b>	<b>PCDL</b>	<b>ESF</b>
<b>Base</b>	<b>50,475</b>	<b>679</b>	<b>19,457</b>	<b>13,966</b>	<b>20,314</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<b>40-44</b>	29.3	44.6	33.9	13.2	32.2
<b>45-49</b>	22.3	29.6	27.9	12.1	26.6
<b>50-54</b>	15.8	16.9	19.1	11.1	20.2
<b>55-59</b>	11.9	6.6	12.9	13.4	14.1
<b>60-64</b>	8.7	1.9	5.0	16.6	5.5
<b>65-69</b>	5.5	0.3	0.9	14.2	0.9
<b>70 +</b>	6.5	0	0.2	19.5	0.4

Source: LSC individualised Learner Records, 2007/8

For learners who are taking Train to Gain courses in the West Midlands in 2007/08, 19.1% are aged 50-54; 12.9% are aged 55-59; and 5.0% are aged 60-64 years.

For learners who are taking Personal and Community Development Learning courses, 11.1% are aged 50-54; 13.4% are aged 55-59; and 16.6% are aged 60-64 years. It is interesting to see that for this type of learning, 14.2% of learners are aged

65-89 years; and 19.5% are aged 70+. These percentages are higher than those for learners aged 50-54 years (11.1%) and 55-59 years (13.4%).

For learners who are on European Social Fund courses in the West Midlands in 2007/08, 20.2% are aged 50-54; 14.1% are aged 55-59 years; and 5.5% are aged 60-64 years.

The table below shows the percentages of men and women in the West Midlands aged 50 to 84 years who are undertaking LSC funded learning in 2007/8. Across the whole of the West Midlands and for all types of learning, 39.9% of learners are men, and 60.1% are women.

Across the six LSC areas in the West Midlands and for all types of learning, women make up the majority of learners: Birmingham and Solihull (57.3%); Coventry and Warwickshire (61.0%); Herefordshire and Worcestershire (61.1%); Shropshire (65.0%); Staffordshire (57.6%); and The Black Country (60.0%).

When broken down by the different types of learning and for the West Midlands region, the majority of learners are women for the following types of learning: FE (63.6%); WBL (81.7%); and PCDL (74.2%). For Train to Gain and ESF types of learning, the majority of learners are men: 54.9% and 54.8% respectively.

**Figure 17: Gender of Learners by LSC Area (Aged 50+)**

Base	Total 50,855		FE 24,450		WBL 175	
	Male	Female	Male	Female	Male	Female
West Midlands	39.9	60.1	36.4	63.6	18.3	81.7
Birm & Solihull	41.8	57.3	37.3	62.7	15.6	84.4
Coventry & Warwicks	39.0	61.0	36.0	64.0	20.6	79.4
Herefords & Worcs	38.9	61.1	36.1	63.9	9.1	90.9
Shropshire	34.9	65.0	29.5	70.5	0	100
Staffordshire	42.4	57.6	39.6	60.4	29.1	70.9
The Black Country	39.4	60.6	36.7	63.3	6.9	93.1
Base	TTG 7,441		PCDL 10,434		ESF 8,355	
	Male	Female	Male	Female	Male	Female
West Midlands	54.9	45.1	25.8	74.2	54.8	45.2
Birm & Solihull	56.4	43.6	23.4	76.6	63.9	36.1
Coventry & Warwicks	53.8	46.2	24.8	75.2	56.2	43.8
Herefords & Worcs	47.3	52.7	34.8	65.2	46.9	53.1
Shropshire	52.0	48.0	27.7	72.3	41.8	58.2
Staffordshire	56.0	44.0	27.3	72.7	63.0	37.0
The Black Country	58.3	41.7	24.8	75.2	52.1	47.9

Source: West Midlands LSC Individualised Learner Records, 2007/8

Worked Based Learning courses have the highest percentages of women learners in each of the West Midlands LSC areas: Birmingham and Solihull (84.4%); Coventry and Warwickshire (79.4%); Herefordshire and Worcestershire (90.9%); Shropshire (100.0%); Staffordshire (70.9%); and The Black Country (93.1%).

Figure 18 shows the ethnic profile of learners aged 50 plus in the West Midlands for 2007/08. Data has been provided for each type of learning. Across all types of

learning 85.7% of learners are White: 5.8% Asian & Asian British; 3.6% Black & Black British; 3.4% Not Known; 0.9% Other Ethnic Group; and 0.5% Mixed.

When compared to the ethnic profile figures from the 2007 Annual Population Survey which were discussed in the demographics section of this report, it can be seen that for all ethnic groups (except White) the percentages of learners who are aged 50+ are higher than their profiles in the whole of the West Midlands region.

**Figure 18: Ethnic Profile of Learners in West Midlands (Aged 50+)**

	All Aged 50+	Total Learners	FE	WBL	TTG	PCDL	ESF
<b>Base</b>	<b>1,818,200</b>	<b>50,855</b>	<b>24,450</b>	<b>175</b>	<b>7,441</b>	<b>10,434</b>	<b>8,355</b>
<b>%</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>White</b>	<b>94.4</b>	<b>85.7</b>	84.2	93.1	89.0	90.1	81.5
<b>Mixed</b>	<b>0.1</b>	<b>0.5</b>	0.6	0.6	0.6	0.2	0.8
<b>Asian</b>	<b>3.5</b>	<b>5.8</b>	6.3	1.1	5.6	2.3	8.9
<b>Black</b>	<b>1.3</b>	<b>3.6</b>	4.0	2.3	2.9	1.8	5.5
<b>Other</b>	<b>0.8</b>	<b>0.9</b>	0.9	0	0.5	0.4	1.0
<b>Not Known</b>	<b>0.0</b>	<b>3.4</b>	3.6	2.9	1.4	5.2	2.5

Source: West Midlands LSC Individualised Learner Records, 2007/8  
\* Residents Aged 50+ West Midlands (Annual Population Survey, 2007)

### **A1.4.3 Full- and Part-Time Learning**

The table below shows data for adult learners in the West Midlands region broken down into 10 year age bands. The majority (51.0%) of learners aged 16 and over in the West Midlands are engaged in learning part-time (other including e-learning). The proportions of learners engaged in other modes of learning were: full-time full-year (23.8%); part-time evening (19.2%); distance learning (2.4%); full-time part-year (2.1%); and part time – open (1.4%).

**Figure 19: Full-Time and Part-Time Learning**

	Total	16-20	21-30	31-40	41-50	51-60	61-70
	%	%	%	%	%	%	%
	100	100	100	100	100	100	100
<b>Weighted Bases</b>	<b>3,720</b>	<b>1,271</b>	<b>513</b>	<b>645</b>	<b>654</b>	<b>396</b>	<b>172</b>
<b>Unweighted Bases</b>	<b>3,323</b>	<b>1,412</b>	<b>414</b>	<b>495</b>	<b>517</b>	<b>302</b>	<b>132</b>
<b>Full-Time Full-Year</b>	<b>23.8</b>	59.5	12.4	5.0	4.1	1.6	*
<b>Full-Time Part-Year</b>	<b>2.1</b>	1.3	1.8	3.0	2.2	3.4	*
<b>Part-Time – Open</b>	<b>1.4</b>	*	*	2.2	2.1	2.5	*
<b>Part-Time – Distance</b>	<b>2.4</b>	0.6	2.7	2.8	3.2	6.1	*
<b>Part-Time- Evening</b>	<b>19.2</b>	5.4	27.7	28.9	25.4	26.3	25.2
<b>Part-Time – Other Including E-learning</b>	<b>51.0</b>	33.2	54.5	58.1	63.0	60.1	65.5

Source: National Learner Satisfaction Survey, 2007  
\* Data has been suppressed because of low bases

Part-time learning is the most popular type of learning for all learners aged 21 and above. This type of learning accounts for at least 90% of learners aged over 30.

### A1.4.4 Areas of Study

The table below shows the subjects that learners in the West Midlands who completed the National Learner Satisfaction Survey, 2007 had chosen to study.

**Figure 20: Subject and Skills Studied**

	Total (16+)	41-50	51-60	61-70	71-80
<b>Weighted bases</b>	<b>9,630</b>	<b>1,696</b>	<b>1,393</b>	<b>1,275</b>	<b>462</b>
<b>Unweighted bases</b>	<b>9,004</b>	<b>1,485</b>	<b>1,278</b>	<b>1,224</b>	<b>452</b>
<b>Science and Mathematics</b>	6.1	6.0	2.8	2.2	1.2
<b>Land-based provision</b>	1.0	0.8	1.3	1.1	*
<b>Construction</b>	3.4	2.2	1.4	0.6	1.1
<b>Engineering, Tech &amp; Manufacturing</b>	4.8	3.4	2.2	1.8	1.5
<b>Business Admin, Management &amp; Prof</b>	5.1	6.2	3.1	0.5	*
<b>ICT</b>	18.0	19.3	24.1	27.5	39.2
<b>Retail, Cust. Service and Transportation</b>	1.1	0.9	1.1	0.5	*
<b>Hospitality, Sports, Leisure and Travel</b>	8.9	7.0	12.2	15.2	12.6
<b>Hairdressing and Beauty Therapy</b>	2.8	1.8	0.9	*	*
<b>Health, Social Care and Public Services</b>	12.1	15.1	7.9	2.9	1.7
<b>Visual and Performing Arts and Media</b>	9.1	6.5	11.3	17.3	16.1
<b>Humanities</b>	0.8	0.7	0.5	0.7	*
<b>English, Language and Communication</b>	13.6	13.9	17.9	17.4	12.6
<b>Foundation programmes</b>	1.3	2.8	0.9	0.8	*
<b>Education</b>	1.8	3.1	1.2	*	*
<b>Accountancy</b>	0.2	*	*	*	*
<b>Psychology</b>	0.1	*	*	*	*
<b>Photography</b>	0.3	*	0.5	0.6	*
<b>Sign Language</b>	0.2	*	*	*	*
<b>Art</b>	0.8	0.3	1.6	1.3	2.6
<b>Health and Safety</b>	0.2	0.5	*	*	*
<b>Law</b>	0.3	*	*	*	*
<b>Floristry/ Horticulture</b>	0.6	1.0	1.0	0.7	*
<b>Graphic Design</b>	0.1	*	*	*	*
<b>Music</b>	0.1	*	*	*	*
<b>Catering/ Cooking</b>	0.6	0.8	*	1.3	1.5
<b>Media</b>	0.0	*	*	*	*
<b>Counselling skills</b>	0.2	0.5	*	*	*
<b>Fashion design</b>	0.3	*	*	*	*
<b>Other</b>	5.9	5.8	6.6	6.3	5.1
<b>Don't know</b>	0.1	*	*	*	*

Source: National Learner Satisfaction Survey, 2007

\* Data has been suppressed because of low bases

Courses in Information and Communication Technology appear to be the most popular courses, with 18.0% of all learners aged 16-90 studying this. When broken down into 10 year age gaps the percentages studying this subject are as follows: 41-50 years (19.3%); 51-60 years (24.1%); 61-70 years (27.5%); and 71-80 years (39.2%).

English, Language and Communication is the subject area with the second highest percentage figure: All ages (13.6%); 41-50 years (13.9%); 51-60 years (17.9%); 61-70 years (17.4%); and 71-80 years (12.6%).

Courses in visual and performing arts and media, and hospitality, sports, leisure and travel are more popular with older learners. For example, 9.1% of the learners aged 16-90 had chosen to study visual and performing arts and media compared to 41-50 years (6.5%); 51-60 years (11.3%); 61-70 years (17.3%); and 71-80 years (16.1%).

For hospitality, sports, leisure and travel courses, 8.9% of the learners aged 16-90 had chosen to study this compared to 41-50 years (7.0%); 51-60 years (12.2%); 61-70 years (15.2%); and 71-80 years (12.6%).

### A1.4.5 Training Expenditure

Data from the National Employer Skills Survey 2007 shows that the total expenditure on training by employers in England is over £38 million. This is equivalent to £1,736 per employee. In the West Midlands region the total employer training expenditure is over £3 million: £1,575 per employee.

**Figure 21: Total Training Expenditure in Region**

	Unweighted base	Weighted base	Total (millions)	% change in expenditure from 2005	Training spend per employee
<b>England</b>	7,190	974,091	£38.648	+16%	£1,736
<b>West Midlands</b>	636	95,930	£3.654	+29%	£1,575

Source: National Employer Skills Survey 2007

Base: All trainers completing the Cost of Training survey.

Notes: Spend per employee rounded to the nearest £25.

Comparisons of training expenditure per establishment show that the mean spend per training establishment is £39,700 in England and slightly lower in the West Midlands at £38,100, equating to £2,775 per trainee in England and £2,450 in the West Midlands.

**Figure 22: Training Expenditure per Establishment**

	Mean spend per training establishment	Spend per trainee (all training)	Spend per trainee (off-the-job training)	Spend per trainee (on-the-job training)
<b>England</b>	£39,700	£2,775	£2,300	£1,750
<b>West Midlands</b>	£38,100	£2,450	£2,075	£1,475

Source: National Employer Skills Survey 2007

Base: All trainers completing the Cost of Training survey (unweighted=7,190; weighted=974, 091).

Notes: Mean expenditure rounded to the nearest £100. Costs per trainee rounded to the nearest £25.

Average spend per trainee for off-the-job training is £2,300 in England and £2,075 in the West Midlands. Spend per trainee for on-the-job training is £1,750 in England and £1,475 in the West Midlands.

## **A1.5 Skills Gaps and Changes in Sectors and Occupations**

This section draws on data from the Annual Business Inquiry 2006; the Annual Population Survey 2007; and the National Employer Skills Survey 2007. It shows that within the West Midlands there are skills gaps in particular occupations, and also skills shortages which people aged 50 and over could fill.

### **A1.5.1 Employer Sizeband**

Data collected from the Annual Business Inquiry Workplace Analysis 2006, shows that within England there are just over 2 million business units and in the West Midlands region there are just over 200,000.

The table below shows that the majority of business units in England and the West Midlands have between 1 and 10 employees: 84.6% and 83.5% respectively.

In England, businesses with 11-49 employees account for 11.9% of the number of business units, and 12.5% in the West Midlands: 2.8% of businesses in England have 50-199 employees, as do 3.2% in the West Midlands. Finally, businesses with 200 or more employees account for 0.7% of all businesses in England and also 0.7% of all businesses in the West Midlands.

**Figure 23: Employer Sizeband**

	England		Total (West Midlands)	
	n	%	n	%
<b>Total</b>	<b>2,074,682</b>	<b>100</b>	<b>200,368</b>	<b>100</b>
<b>1-10 employees</b>	1,755,389	84.6	167,392	83.5
<b>11-49 employees</b>	247,041	11.9	25,176	12.5
<b>50-199 employees</b>	58,671	2.8	6,355	3.2
<b>200 or more employees</b>	13,581	0.7	1,445	0.7

Source: Annual Business Inquiry Workplace Analysis 2006, NOMIS

### **A1.5.2 Projections for Sectoral Change**

Figure 24 shows how sectors in the West Midlands have expanded or declined from 2002 to 2006. Several sectors have seen increases in businesses over this time period. The Banking, Finance and Insurance sector has seen an increase in the number of business units in the West Midlands from 2002 (47,470) to 2006 (59,225). This is an increase of 24.8%.

The Public Administration, Education and Health sector in the West Midlands has seen an increase in business units of 14.5%: 15,787 business units in 2002 and 18,084 in 2008. The Construction industry in the West Midlands has also seen an increase of 14.5%: 17,052 business units in 2002 and 19,527 in 2006. The Distribution, Hotels and Restaurants sector has seen an increase in the number of business units in the West Midlands from 2002 (58,397) to 2006 (59,399). This is an increase of 1.7%.

Sectors which have seen a total decline in business units in the West Midlands are: Energy and Water (down 16.1% from 385 units in 2002 to 323 in 2006); and Manufacturing (down 10% from 20,723 units in 2002 to 18,653 in 2006).

**Figure 24: Projections for Sectoral Change in the West Midlands**

	2002	2003	2004	2005	2006
<b>Agriculture &amp; Fishing</b>	600	615	620	601	599
<b>Energy and water</b>	385	367	330	350	323
<b>Manufacturing</b>	20,723	20,258	19,487	18,988	18,653
<b>Construction</b>	17,052	17,649	18,346	19,120	19,527
<b>Distribution, hotels and restaurants</b>	58,397	58,479	58,596	59,188	59,399
<b>Transport and communications</b>	9,162	9,478	9,217	9,468	9,679
<b>Banking, finance, insurance, etc</b>	47,470	50,174	52,981	56,838	59,225
<b>Public administration, education and health</b>	15,787	15,937	16,254	18,028	18,084
<b>Other services</b>	14,855	15,234	14,765	15,001	14,939

Source: Annual Business Inquiry Workplace Analysis 2006, Nomis

Agriculture and Fishing; and Other Services sectors have seen both increases and decreases in the number of business units in the West Midlands between the years 2002 and 2006.

In 2002, the Agriculture and Fishing sector had 600 businesses, by 2004 this sector had increased to 620 units and by 2006 it had decreased to 599 units. The number of businesses included in the 'Other Services' sector peaked in 2003 with 15,234 units, but decreased to 14,939 units by 2006.

### ***A1.5.3 Occupation by LSC Area***

Figure 25 displays data from the Annual Population Survey 2007 and provides a breakdown of occupations in which workers in the West Midlands LSC areas are recorded as being employed in.

Across the West Midlands LSC region as a whole, 14.7% of the working population are employed as Managers and Senior Officials; 12.8% in Associate Professional and Technical Occupations; 12.2% in Professional Occupations; and also 12.2% in Elementary Occupations. The remaining breakdown for the whole of the West Midlands LSC region is as follows: Skilled Trades Occupations (11.9%); Administrative and Secretarial Occupations (11.7%); Process, Plant and Machine Operatives (8.9%); Personal Service Occupations (8.1%); and Sales and Customer Service Occupations (7.5%).

Workers employed as Managers and Senior Officials make up the largest percentage of the Birmingham and Solihull working population (14.9%); Coventry and Warwickshire working population (15.7%); Herefordshire and Worcestershire working population (17.7%); and Staffordshire working population (13.3%). In Shropshire the largest percentage of the working population is employed in Skilled Trades Occupations (14.5%): closely followed by Managers and Senior Officials at 14.4%.

In the Black Country, the largest percentage of the working population is employed in Elementary Occupations (13.7%).

**Figure 25: Occupations by LSC Area**

	West Midlands	Birmingham & Solihull	Coventry & Warwickshire	Herefordshire & Worcestershire	Shropshire	Staffordshire	The Black Country
<b>Total</b>	<b>% 100</b>	<b>% 100</b>	<b>% 100</b>	<b>% 100</b>	<b>% 100</b>	<b>% 100</b>	<b>% 100</b>
<b>Managers &amp; Snr Officials</b>	14.7	14.9	15.7	17.7	14.4	13.3	12.8
<b>Professional Occupations</b>	12.2	14.4	12.5	12.1	12.7	11.5	9.7
<b>Assoc Prof &amp; Tech</b>	12.8	12.9	13.5	12.0	13.9	12.9	11.6
<b>Admin &amp; Secretarial</b>	11.7	11.4	12.5	11.2	10.5	12.6	11.4
<b>Skilled Trades</b>	11.9	9.3	10.6	13.5	14.5	11.8	13.1
<b>Personal Service</b>	8.1	8.9	7.4	7.3	8.1	7.8	8.4
<b>Sales and Cust Service</b>	7.5	7.4	7.0	7.1	6.9	8.3	7.8
<b>Process/Plant/Machine Ops</b>	8.9	8.3	8.1	8.0	8.0	9.0	11.0
<b>Elementary Occupations</b>	12.2	12.2	12.2	10.6	10.9	12.5	13.7

Source: Annual Population Survey 2007, Nomis

Workers employed in Sales and Customer Service roles make up the smallest percentage of the working population for the following areas: Birmingham and Solihull (7.4%); Coventry and Warwickshire (7.0%); Herefordshire and Worcestershire (7.1%); Shropshire (6.9%); and The Black Country (7.8%). In Staffordshire the smallest percentage of the working population in this area is employed in Personal Service Occupations (7.8%).

#### **A1.5.4 Employee Job Estimates by Industry and Gender**

Figure 26 (over the page) shows employee job estimates by industry and gender for the West Midlands LSC region. It is estimated that there are over 2 million workers in the West Midlands and 26.7% of workers are employed in Public Administration, Education and Health industries; 23.9% of workers are employed in Distribution, Hotels and Restaurants; 18.5% Banking, Finance and Insurance industries; 14.2% Manufacturing; and 5.4% Transport and Communications. The remaining breakdown for the whole of the region is as follows: Other Services (5.2%); Construction (5.0%); Agriculture and Fishing (0.8%); and Energy and Water (0.5%).

A breakdown by gender shows that within the male working age population of the West Midlands, the largest proportion is employed in the Distribution, Hotels and Restaurant industry (22.1%). The remaining breakdown for men of working age in the West Midlands is as follows: Manufacturing (21.6%); Banking, Finance and Insurance (19.4%); Public Administration, Education and Health (13.5%); Construction (8.4%); Transport and Communications (8.1%); Other Services (5.2%); Agriculture and Fishing (1.0%); and Energy and Water (0.7%).

**Figure 26: Employee Job Estimates by Industry and Gender – West Midlands**

	Total		Male		Female	
	n	%	n	%	n	%
<b>Total</b>	<b>2,373,978</b>	<b>100</b>	<b>1,192,801</b>	<b>100</b>	<b>1,181,177</b>	<b>100</b>
Agriculture and fishing	19,366	0.8	12,127	1.0	7,239	0.6
Energy and water	12,245	0.5	8,432	0.7	3,813	0.3
Manufacturing	337,072	14.2	257,576	21.6	79,496	6.7
Construction	117,534	5.0	99,645	8.4	17,889	1.5
Distribution, hotels and restaurants	566,333	23.9	263,854	22.1	302,479	25.6
Transport and communications	127,483	5.4	96,364	8.1	31,119	2.6
Banking, finance and insurance, etc	438,020	18.5	231,706	19.4	206,314	17.5
Public administration, education & health	633,223	26.7	160,546	13.5	472,677	40.0
Other services	122,702	5.2	62,551	5.2	60,151	5.1

Source: Annual Population Survey 2007, Nomis

For women, the largest proportion (40.0%) is employed in the Public Administration, Education and Health industry. The remaining breakdown for women of working age in the West Midlands is as follows: Distribution, Hotels and Restaurants (25.6%); Banking, Finance and Insurance (17.5%); Manufacturing (6.7%); Other Services (5.1%); Transport and Communications (2.6%); Construction (1.5%); Agriculture and Fishing (0.6%); and Energy and Water (0.3%).

### ***A1.5.5 Distribution of Skills Gaps by Occupation***

The table below shows data from the National Employer Skills Survey (NESS) 2007 for England and the West Midlands. NESS is a large-scale representative survey of employers commissioned by the Learning and Skills Council (LSC); the Department for Innovation Universities and Skills (DIUS); and the Sector Skills Development Agency (SSDA). The data demonstrates recruitment difficulties, skills gaps and training patterns. The distribution of skills gaps in England and West Midlands region are show below. The profile of employment has been provided for comparison.

**Figure 27: Distribution of Skills Gaps by Occupation**

Number of skills gaps	England 1,361,000		West Midland 126,000	
	Skills gaps (%)	Profile of employment (%)	Skills gaps (%)	Profile of employment (%)
Managers	12	18	10	17
Professionals	9	12	9	12
Associate Professionals	7	7	4	6
Administrative	14	14	11	15
Skilled trades	8	7	12	9
Personal Service	7	8	6	8
Sales	19	14	20	13
Operatives	7	7	10	7
Elementary	17	14	17	13

Source: National Employer Skills Survey (NESS) 2007

Figures for England show that the concentration of skills gaps in Sales and Elementary Occupations are higher than their proportion of employment. Within the West Midlands region, positions which have skills gaps which are higher than the proportion of employment are: Sales (20%); Elementary Occupations (17%); Skilled Trades (12%); and Operatives (10%).

### **A1.5.6 Identified Skills Shortages**

Figure 28 shows the regional pattern of skills lacking for England as a whole compared to the West Midlands. Figures for England and the West Midlands show a very similar pattern of skills which employers are lacking. Data for England shows that 51% of employers have reported a lack of technical and practical skills and for the West Midlands 58% of employers have reported this.

Employers in the West Midlands are most likely to be lacking in the following skills: customer handling skills (33%); team working (32%); oral communication (31%); problem solving skills (28%); written communication (21%); management skills (20%); and general IT user skills (19%).

**Figure 28: Skills Shortages**

	<b>England</b>	<b>West Midlands</b>
<b>Unweighted base</b>	120,592	12,170
<b>Weighted base</b>	1,121,000	109,000
	<b>%</b>	<b>%</b>
<b>Technical &amp; practical skills</b>	51	58
<b>Customer handling skills</b>	41	33
<b>Oral communication</b>	41	31
<b>Team working</b>	40	32
<b>Problem solving skills</b>	25	28
<b>Written communication</b>	27	21
<b>Management skills</b>	26	20
<b>General IT user skills</b>	22	19
<b>Literacy skills</b>	19	14
<b>Office admin skills</b>	18	14
<b>Numeracy skills</b>	15	13
<b>IT professional skills</b>	12	11
<b>Foreign languages</b>	9	10

Source: National Employer Skills Survey (NESS) 2007

Base: All skills gaps followed up.

Note: Column percentages do not sum to 100 per cent because of multiple responses.

As shown in Figure 10, the proportion of older workers working in Skilled Trades or as Operatives is above that of the working age population as a whole. This means that the older workforce has a positive part to play in ‘plugging’ the skills gaps/shortages in the West Midlands region. Moreover, older workers were seen by employer and older worker participants as possessing skills such as interpersonal, communication and time management skills, which are of value in the workplace and which employers in the West Midlands see as lacking.

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