

The literature on the older workforce: a CROW Review 2004

In recent years there has been a rapid growth of research interest in ageing, and in the activities of people over 50, as the issues rise to policy prominence throughout the developed world. In the UK, Government has launched the Age Positive Campaign, and there have been initiatives from the EU and the OECD (see Taylor, 2002; Hornstein et al, 2002; Beck, 2000; Walker & Maltby, 1997). There have also been two major research programmes from ESRC (the Growing Older Programme), and from the Joseph Rowntree Foundation (Transitions after 50 programme). This chapter briefly summarises some of this work and other literature on older workers and the labour market. It is divided into three sections:

- What has been happening in the labour market?
- What transitions are people making?
- What factors work to enable or constrain older worker's choices?

This Review will attempt to highlight some key issues, identify relevant texts and those issues that are under-researched at present. It is worth noting anumber of limitations at the outset that the majority of work already published focuses on the UK as a whole and as such does not highlight any regional differences. Most of the body of material currently available focuses on paid work, as distinct from unpaid work, such as voluntary and community work carried out in the community and/or informal care, although we know that the latter plays an important role in the activity of people in their 50s and 60s carried out within the context of close relationships. There is an extensive literature on finance and older people, but the intricacies of this are outside the remit of the present project, and therefore not touched on here.

What has been happening in the labour market?

Over the last 30 years there have been a number of significant structural changes to the make up of both the population and the economy which have had an impact on the dynamics of the labour market. We live in an era of ongoing and increasing 'greying' of the population, as people live longer and subsequent generations continue to shrink in size. This means that there will be more older people as a proportion of the working population. This is not necessarily a problem and can be seen as a triumph of the post-war welfare state nations of Europe, as people's health, education, standards of living and working conditions have improved significantly. However, it raises real issues in the management of the workforce.

Running parallel to this have been structural changes in the economy, resulting in a de-industrialisation and 'flexibilization' of the labour market, and an increasing polarisation between the high-skilled core or primary workers and the low-skilled peripheral workers. Both are required for the economy to function, but the shrinkage of the intermediate groups makes social and economic mobility increasingly difficult.

At the same time, there has been a corresponding trend in most advanced industrialised nations for people to leave the labour market earlier. In short, we are

healthier, living longer and working less; a factor that is exacerbated in the South East of England where skills shortages are increasing in an economy operating permanently at near full employment.

Older workers and the labour market

Research into the older labour market has been patchy. Much of the focus of existing work has been on the polarised ends of the two-nations of old age: the healthy and wealthy and the poor and the sick. There does not appear to be much research into the labour market activity for those who remain in the labour market and the constraints and choices they face. Equally much of this research has looked at and commented on the labour market habits and experiences of older men rather than older women.

Early Retirement

Extensive analytical work most notably by Campbell (1998), Scales and Scase (2000) and more recently by Disney and Hawkes (2003), into the older worker labour market has focused especially on the early exit phenomenon that has been growing since the late 1970s. Labour market participation rates for older men and older women are markedly different and have changed at differing rates since 1979 (Campbell, 1999:p26). The biggest rise has been in early exit amongst older men, whose labour market activity fell dramatically in the early 1980s. There are signs of small increases since the lows of the mid-1990s and recent research by Disney and Hawkes (2003) indicates a halt in the decline. Campbell (1999) in his study of the Labour Force Survey and the British Household Panel Survey identified further features of men's employment rates, including:

- bigger declines in labour market participation since 1979 for men with lower qualifications, and especially those with no qualifications;
- a marked decline in employment rates for more qualified men in their late 50s;
- working in a declining industry means a greater risk of displacement from the labour market;
- as does having an occupational pension, which significantly increases chances of displacement;
- there would have been 1.8 million more men in the labour market in 1997 had participation rates not fallen (pp1-40).

Older women

Whilst employment rates for all men have fallen since 1979, as has their relative wage value, women's employment rates have risen and has been growing with each successive cohort. However, women over 50 appear not to have experienced the same increases as their younger counterparts. Women of all ages participate less in the labour market than men do (Campbell, 1999:pp1-30), they tend to be lower paid and largely work part-time, their work histories are often interrupted to raise families or care for other relatives (see Bardasi & Jenkins, 2002; Gough, 2001). Research carried out in the early 1990s indicates that women in the workplace are perceived by

management as being older earlier and as a result experience age discrimination in employment opportunities earlier than men (Bernard, Itzin, Phillipson & Skucha, 1995:pp61-2). Women are more likely to experience poverty in old age, due largely to lower pay and interrupted work histories, and it is anticipated that the inequalities in post-retirement earnings between men and women will widen faster in the next 30 years (Gough, 2001:p330). This obviously has serious ramifications in terms of retirement income for women.

Two-nations

Many of these findings about a polarisation in outcomes for older workers have been borne out in later studies and have resulted in a resurgence of the concept of the 'two nations' of old age, first coined by Richard Titmuss in the 1950s. This demonstrated how the distinct differences in levels of personal income and autonomy for those at the top and the bottom of the labour market contribute to determining choices about work, retirement and lifestyle. Arguably it could be said that these two nations are polarised between

- a) the high skill, high paid affluent workers, usually in managerial and professional careers who, having an occupational pension, are more likely to retire early through choice and in comfort, and
- b) the low skill, low paid, as well as the sick and disabled, who usually leave the labour market involuntarily and find it difficult to return, leading to an extended period of poverty post-work for many (see Bardasi & Jenkins, 2002:p2; Phillipson, 2002:p13; Scales & Scase, 2000; Cabinet Office, 2000).

Men who retire early are most likely to be in either managerial, craft or semi-skilled industrial occupations. Those who leave the labour market early due to ill health appear to have a low survival rate in the long term. (see Barnham, 2002; Tanner, 1998; Meadows, 2002).

Gender

Women traditionally have had fewer and smaller occupational pensions and so a 'two nation' effect amongst women has not been so significant. Dixon (2003) suggests it is possible that as early cohorts of women progress into more senior positions a polarisation may grow amongst women in terms of work transition and post-work income; this is one area where there is currently a gap in the literature.

Demand issues

Most work to date has looked at older workers in terms of gender, age, educational and sectoral differences and few have commented on regional variation across regions of the UK.

Region

It is worth noting that there is some evidence that those areas that experience the highest overall employment rates, like the South East, see the highest employment rates for older workers (McKay & Middleton, 1998). Labour force mobility is a key issue, particularly in the South East Region where housing costs are high and transport congested. As the population ages, it is likely to become a problem as geographical mobility has a tendency to decline with age (see Dixon, 2003:p71).

Service/retail

Many older workers find themselves in the service sector and/or employed part-time, especially in the retail sector (Taylor & Walker, 1998). There are well known examples of firms, including B&Q, Smiths, Sainsbury's and Tesco's, taking a pro-active stance on employing older people for some very positive reasons (Walker & Maltby, 1997:p82). It is argued that this sector may serve to benefit older workers whose stronger interpersonal skills would make them more employable than perhaps younger workers (Disney & Hawkes, 2003). However, as Casey, Metcalf & Lakey (1993:p62) argue, targeting older people for very selective entry level-type jobs like these can merely serve to exploit their vulnerable position within flexible labour markets and help to reinforce ageist stereotypes.

Labour Market Restructuring

A major influence on the status of older workers has been the restructuring of labour markets in Europe since the 1980s (see Phillipson, 1998; Carnegie Trust, 1993). Advances in technology and production methods have served to reduce demand for unskilled labour, causing distinct structural changes to the labour market in advanced industrialised societies. Europe has seen a marked decline in industrial employment, particularly in highly paid, low or semi-skilled full-time work, which has hit older men hardest, with a corresponding rise in part-time, predominantly female, low-paid, service industry jobs (see Taylor-Gooby, 2001); Beck (2000) has termed this a 'feminization' of the labour market. Demand for educated and highly skilled professional and knowledge workers who command high salaries has also increased, leading to a marked polarisation in the labour market and growing inequalities. The characteristics of a flexible labour market can be seen as increasing employment insecurity and intensifying working practices, leaving many with work histories that are inconsistent with adequate pensions provision, which usually requires a lifetime of full-time work (see Disney & Hawkes, 2003; Beck, 2000; Adnett, 1996).

Increasing Demand

On a positive note, it seems that the large scale losses of employment for the over 50s, particularly for men, brought about by major declines in manufacturing and the downsizing of the public sector are over. There does seem to be some evidence of an upturn in the numbers of skilled older workers, but Disney and Hawkes (2003) suggest that this may be as much to do with economic expansion as to an increased demand for older workers *per se*. In the past, older workers have been far more susceptible to technological change and have historically had fewer related IT skills than younger workers; however this problem is likely to decline as technologically

illiterate cohorts age (Scales & Scase, 2000). This is particularly pertinent for areas, like the South East, where there are shortages of IT skills (see Skills Insight, 2002) and lead to the opening up of opportunities in the IT labour market for older workers as levels of ICT competencies rise with successive cohorts. It is also possible that as better educated cohorts of upcoming generations age then productivity levels for older workers could also increase (see Dixon, 2003); another issue that is of importance for the South East Region.

Age stereotypes, ageism and legislation

It is widely recognised that many of today's stereotypes act as major barriers to older people both in work and seeking work (Help the Aged, 2002), and it is in this context that the Age Discrimination Bill (ADB) is being introduced. Many negative images about older workers are linked to the gradual and increasing ousting of older people from the labour market (Hareven, 1995:p131); and are largely related to detrimental stereotypes about fitness for work (Blaikie, 1999:p42), such as work effectiveness, adaptability and physical strength (War & Pennington, 1993:p77).

Yet, as we have already seen, there are some sectors which have more positive attitudes to older workers and this is reflected in employment practices which would suggest that in some areas age discrimination is reducing. However, older worker friendly flexible working practices such as phased retirement or job redesign are still, it seems, rare (Taylor & Walker, 1998). Age discrimination is one of a many factors that influence recruitment and retention decisions made by employers. Other reasons can be down to economic factors, industry restructuring processes, employees' health and most importantly, the desire and motivation of individuals to stay in the labour market (Moore, Tilson & Whitting, 1994:p4).

Legislation

It is argued that the success of age discrimination policies depends upon active support of employers and trade unions as social partners (European Commission, 1999:p6); the "greying of the workforce" looks set to present major challenges that few organisations feel able to fulfil (IPM, 1993) and they are looking to government to help reverse the trend of early exit (DTI, 2000). How effective the upcoming Age Discrimination Act (due 2006) will be remains to be seen. Research findings from studies on the impact of age discrimination legislation in other countries shows that the impact of legal remedies are limited, and that it is difficult to pin point the effects of legislation on the labour market (Hornstein, 2001).

Early retirement as policy

Public perceptions of older workers have fluctuated over time in relation to their position in the labour market and are linked to the use of delayed or early retirement as an instrument of labour-force policy (Dex & Phillipson, 1986:p45). In times of recession and increased (in)voluntary early exit, whole generations of workers have been removed from organisations, and this increased inactivity of the over 55s has a

knock on effect on the whole economy (IPM, 1993:p1). Arguably, older people have, to some extent, functioned as a reserve army of labour, encouraged to either delay leaving or exit early from the labour markets in times of labour shortage and high unemployment (Harris, 1991:p104). This has been true at least since the 1950s and can be linked to factors such as the changing needs of the economy and demographic changes, as well as prevailing stereotypes about workers (Casey, Metcalfe & Lakey, 1993:p65). Amongst these three distinct phases can be identified:

1. At a time of labour shortages during the post-war reconstruction period older workers were being commended for their steadiness and reliability and extolled for remaining past retirement age (Fennell, Phillipson & Evers, 1988:p38).
2. By the 1980s older workers were being actively encouraged and praised for leaving earlier (Phillipson, 1998:p2). This was during a time of recession and in a period in which the “Bulge” cohorts ¹were entering the labour market. Age selective redundancies, backed by the Job Release Act, 1977, gave rise to a consensus that accentuated negative stereotypes and accepted the political expediency of shedding older workers *en masse* (Casey, Metcalf & Lakey, 1993:p49), thereby enabling the restructuring of industry (Moore, Wilson & Whiting, 1994:p10).
3. The last ten years have seen a radical shift towards placing renewed value on older workers remaining in the labour-force and emphasising the positive side of age stereotypes in the process (Moore, Tilson & Whiting, 1994:p5). This has been reinforced by a politicised discourse of demographic ‘time-bombs’ and untenable ‘pension burdens’ (see McMorrow & Roeger, 1999).
4. In today’s economic climate, Government argues that for Britain to remain competitive it “needs to make better use of older people in the workforce” and needs to make jobs more accessible and appealing to them by increasing flexibility through gradual retirement, subcontracting, telecommuting and part-time options (DTI, 2000:p4-13).

Trades Unions

Researchers disagree on the role of trade unions in furthering older workers’ interests. Some argue that, with longevity in the workplace, older workers benefit from union policies that favour long service, for example last-in/first-out redundancy procedures (Brugiavini et al, 2001). Most research highlights the difficulties for unions in balancing the interests of younger and older members, although unions themselves see a mutual interest for all members in a lower retirement age (Duncan et al, 2001). Others suggest that unions have a history of supporting early exit policies in periods of high unemployment in order to support the interests of younger workers (Blaikie, 1990). That being said, unions have in recent years devoted resources to helping older workers develop skills and re-enter the labour market. Projects have been developed both in declining industries which have seen large scale redundancies (e.g. ISTC’s Steel Partnership Training), and industries with high labour demand (e.g. Unison’s Return to Learn).

¹ The UK is unusual in the in the post-world war period the population experienced two bulges. The first was between 1946-1950 and the second 1960-65 (see Evandrou, 1997)

Stereotypes

Dominant labour market stereotypes in operation today are again changing in response to new economic and demographic needs and are a mixture of both positive and negative perceptions. Table 8 provides a synopsis of typical stereotypes found in the workplace during research carried out by the Carnegie Trust (1999) and the DWP (2001).

Table 8

	Younger Workers	Older Workers
Positive	<ul style="list-style-type: none"> ▪ enthusiastic ▪ flexible/adaptable ▪ energetic ▪ ambitious ▪ healthy ▪ having IT skills ▪ having qualifications ▪ mobile 	<ul style="list-style-type: none"> ▪ experience/knowledgeable ▪ reliable ▪ conscientious ▪ loyal/commitment ▪ hard working ▪ having stability/maturity ▪ having managerial skills
Negative	<ul style="list-style-type: none"> ▪ lacking loyalty/commitment ▪ lacking experience /knowledge ▪ lacking work ethic ▪ poor attendance/timekeeping ▪ ill-mannered ▪ irresponsible/immature 	<ul style="list-style-type: none"> ▪ difficulty adapting to new skills ▪ likely to be ill ▪ slow learners ▪ unambitious ▪ greater interest in job security over performance

Age related stereotypes used in work

(Carnegie Trust 1999: p21 & DWP, 2001:pp12-13)

Equal Opportunity Policies

Many of these stereotypes are found in the attitudes and practices of the workplace, specifically in terms of selection and recruitment processes and training and promotion (Walker & Maltby, 1997:p78). Age discrimination is readily accepted in the workplace as intrinsic and is often justified on the grounds of the needs of the business (Casey, Metcalfe & Lakey, 1993:p51; DWP, 2001:p3&9), although a survey by the Institute of Personnel Management found that many employers were aware of the contradictory nature and tensions between their equal opportunity policies and the age discriminatory practices they carried out (Casey, Metcalfe & Lakey,

1993:p49). However, There is some evidence of change in research carried out by National Opinion Polls for the Government into the effectiveness of the Voluntary Code of Practice on Age Diversity (DWP, 2001), this found that attitudes and practices towards older people in the workplace are generally becoming more positive.

Key Texts:

- Cabinet Office, Performance and Innovation Unit (2000) *Winning the Generation Game*
- Campbell, N (1999) *The Decline in Employment Among Older People in Britain*
- Dept of Work & Pensions (2001) *Evaluation of the Code of Practice an Age Diversity in Employment*
- Disney R & Hawkes, D (2003) *Declining Employment for Older Workers: has Britain turned the corner?*
- Scales, J & Scase, R (2000) *Fit and Fifty?*
- Taylor, P & Walker, A (1998) *Employers and Older Workers: attitudes and employment practices*

What transitions are people making?

There are a number of exit routes out of the labour market for the older worker including redundancy, retirement, sickness and disability and taking on caring roles (Cabinet Office, 2000; Taylor & Walker, 1993). There are also a number of 'bridging' options from full-time work into retirement available such as reduced hours, part-time and/or temporary work and self-employment (Lissenburg & Smeaton, 2003). Research carried out suggests that there is positive support from older workers for more flexible forms of working practices and retirement options with their existing employers (see Walker & Maltby, 1997; Penna Sanders & Sidney, 2002).

Flexible working

Most research to date has looked at flexible working conditions in relation to either new jobs or caring responsibilities, Lissenburg and Smeaton's (2003) study of transitions out of full-time, permanent work into 'bridge' jobs such as reduced hours, self-employment, part-time and temporary work found that educational and pay levels were the main factors affecting whether men and women are likely to make this move. The findings showed that older women have more of the transferable skills suitable to flexible working than men have and are far more positive about making a transition. This bears out the position raised by Szinovacz (1991) who argues that women's discontinuous work-histories means that for many their mid-life job transitions are viewed as a 'special challenge and an opportunity' (cited Bernard et al, 1995:p57).

Gender and flexibility

Men and women undertake different types of flexible employment. Men are more likely to be self-employed or work on a fixed term contract and women more likely to have part-time work (Lissenburg and Smeaton, 2003). As this study focused on transitions out of full-time work, it did not take into account that women of all ages do the majority of part-time work (Beck, 2000). Whilst concluding that women have a more favourable labour market position than men when it comes to 'bridge' jobs, Lissenburg and Smeaton make the point that many of these jobs are low quality and low-paid. This is in conflict with the desire of many older workers not to see a reduction in their levels of responsibility when considering more flexible working patterns (Penna et al, 2002).

Self Employment

Those who are moving from managerial or professional positions are most likely to be self-employed and once there are more likely to stay working for longer. Indeed the self-employed are mostly amongst the over 50s (Curran & Blackburn, 2001; McKay & Middleton, 1998), although, it seems that the majority of those currently employed reject the idea of self-employment because of the risks involved, the insecurity it would bring and the effort involved in organising it (Curran & Blackburn, 2001).

US comparisons

One of the largest studies carried out of work transition by older people was carried out in the USA by AARP (2002). This found that flexible working arrangement and bridge jobs are high on the agenda for older workers in the US. Many of those interviewed were confident of their ability to find and retain work in the future but concerns about age discrimination are high. The study identified four clusters of type of older workers and their relationships with work and the labour market:

- Sustainers: the largest segment who work to live and for whom money is a major factors in their decision to work;
- Providers: workers 'in the middle' balancing caring roles with work and for whom working is important to their self esteem;
- Connectors: have particular connection usually to a particular workplace for whom work benefits and future pensions are important;
- Contributors: live to work and are more likely to be in executive and professional jobs and are most likely to experience job satisfaction. They are also the group most likely to re-enter the work since retirement..

However, the sample of the AARP study was predominantly aged between 45-56 years (70%) in white-collar occupations (75%) and above, with most having qualifications over and above high school (93%). The average tenure with the current employer was 13 years. This bias towards a predominantly white, educated in secure employment and its cultural and economic context make this work interesting, but probably not directly applicable to an UK context.

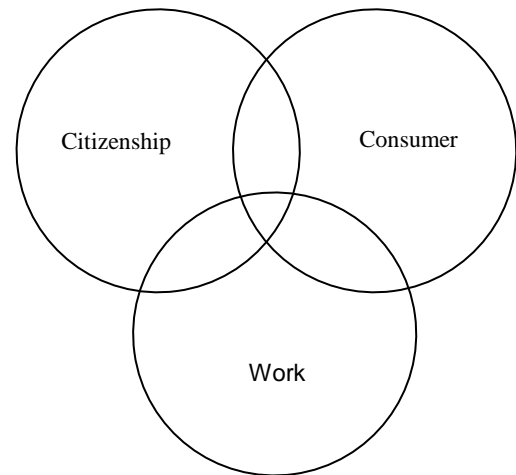
New lifecourse transitions

The factors that influence older worker's transitions are complicated and linked largely to life-course factors and work histories. Phillipson (2002) argues that, transitions over the age of 50 are becoming more complex and relate to much broader life issues. He highlights three overlapping areas as significant for the over 50s when making decisions about work/life transitions today which should be seen within the context of the constraints of each person's own level of social capital and their ability to exercise choice.

Citizenship transitions: constructed around closer involvement with family, friends and community-based networks;

Consumer and leisure transitions: constructed around the development of more individualised lifestyles;

Work transitions: constructed around new types of engagement with paid work (p21).



Early retirement

Since the post-war period the primary mechanism for exiting the labour market has been reaching state retirement age, but this is no-longer the case for large numbers of the over 50s (Walker & Maltby, 1997). However, employment levels for those approaching state retirement age have always been lower than average (Cabinet Office, 2000:13). This age has not changed since its inception in 1948, when it was assumed that the average person would work for at least forty years; today many work for no more than thirty years with each successive generation expecting to retire earlier (Campbell, 1999:p48).

Economic inactivity

The extended and prosperous lifestyle associated with early retirement is largely the prerogative of the few, notably those situated in the top quartile of wage distribution with good occupational pensions (Cabinet Office, 2000:p20; Campbell, 1999:p33). However, high labour market status does not necessarily guarantee wealth in old age as lower rates of return on investments are eroding pension funds and savings (DTI, 2000:p24). Most early exiters do so either involuntarily or through making very constrained choices (Cabinet Office, 2000: pp19-22). Unemployment for older people

is usually long-term and few over 45s who become economically inactive return to the labour market once they have left (Cabinet Office, 2000:p15; Campbell, 1999: p46).

Long term sick & disabled	1,250,000	44 %
Retired	500,000	18 %
Looking after home or family	400,000	14 %
Seeking work	290,000	10 %
Don't need a job	150,000	5%
Other	260,000	9%

Table 9. Labour Force Status of Inactive 50+ Workers
(Cabinet Office, 2001, p21)

Recent figures show that there are 2.8 million over 50s not working, with a significant number of these claiming state benefit and living in relative poverty (Cabinet Office, 2000:p5). Table 9 gives a breakdown of this figure in terms of types of economic inactivity and illustrates that there are far fewer job seekers than sick or disabled. In regions with high overall unemployment rates, especially through the loss of male semi-skilled employment, there is a corresponding rise in those claiming Incapacity Benefit amongst the over 50s (Campbell, 1999:pp54-6, Howard, 1998:p144).

Some argue that because this is an involuntary situation for many, it reflects and is explained by weak labour demand for those over 50 (Catalyst Forum, 2002:p14; Taylor & Walker, 1993:p5). Flexible working options, such as temporary, part-time and self-employment, were the major route back into work for the unemployed of all ages during the 1990s, but few found this to be a step into full-time or permanent work (JRF, 1998); a factor that mitigates against those older workers who require the income that full-time work brings (Walker & Maltby, 1997). Clearly this is not such an extensive issue in the South East where employment levels remain high and where employment growth is projected to increase (Skills Insight, 2002), although, even there, there will be numbers of older workers who experience exclusion from the labour market.

Key Texts:

- Cabinet Office, Performance and Innovation Unit (2000) *Winning the Generation Game*

- Campbell, N (1999) *The Decline in Employment Among Older People in Britain*
- Curran, J & Blackburn, R (2001) *Older People and the Enterprise Society: age and self-employment propensities*
- Lissenburg, S & Smeaton, D (2003) *Employment Transitions of Older Workers: the role of flexible employment in maintaining labour market participation and promoting job quality*
- Phillipson, C (2002) *Transitions from work to retirement: developing a new social contract*
- Walker, A & Maltby, T (1997) *Ageing Europe*

Factors which enable or constrain older workers choices

The major factors which enable or constrain the transitions of older workers in the labour market are shown in figure 45

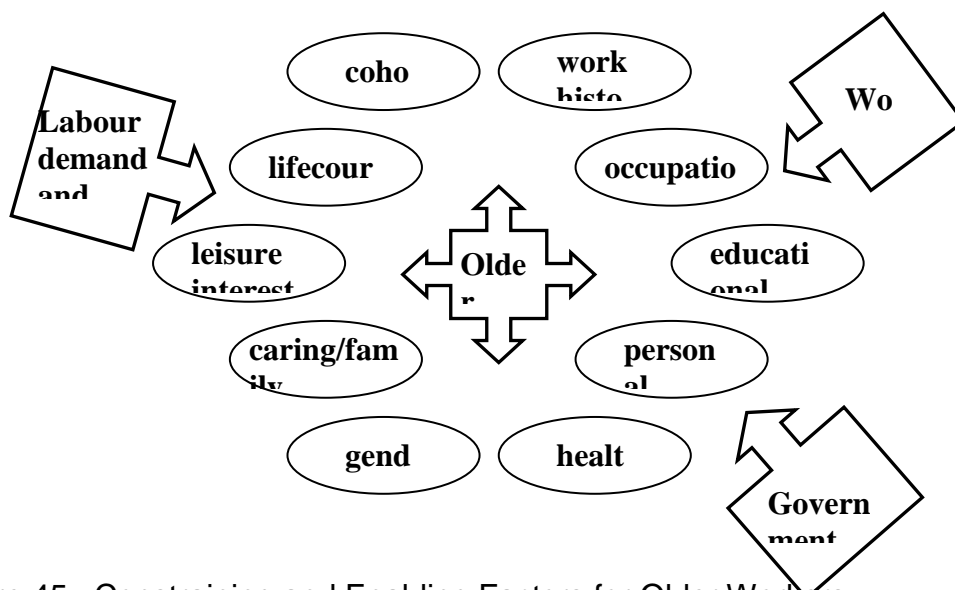


Figure 45 : Constraining and Enabling Factors for Older Workers

Personal finances

Much of the research confirms that income and health are the primary factors people's choices about making a transition within or exiting the labour market. It is primarily those in the top quartile of income and those in low-skilled occupations who leave early (Campbell, 1999; Cabinet Office, 2000; Scales & Scase, 2000). Income distribution among older people is much the same as across other age groups (Carnegie Trust, 1993) although, inequalities in income increase as people age (Banks & Tanner, 1999). Amongst older people those who work are the highest income earners and the job seekers are those with the lowest income (Barker & Hancock, 2000). Those who work beyond retirement age are most likely to

experience financial hardship and to still have mortgage commitments (Smeaton & Mackay, 2003). Banks and Tanner (1999) found that most households do not have large amounts of financial wealth, with most wealth being tied up in non-liquid assets such as property or occupational pensions, with the poorest groups having no wealth at all. The long-term sick are also least likely to be homeowners or to have occupational pensions (Barker & Hancock, 2000).

Home Ownership

Home ownership is a major factor in wealth distribution amongst older people, as for most households it represents their only non-pensions wealth (Disney et al, 2001), although this does not necessarily imply increased wealth in old age. Not all homes are of high value and those on lower incomes tend to be tenants or have lower value homes; and regional differences in housing values are not reflected in differing living costs (Hancock et al, 1999). The impact of the tax rules for occupational pensions have been a factor in influencing the more affluent to retire early, although recent Government proposals are set to make some changes to these (DWP, 2002).

Health and disability

As was indicated earlier (see Table 9), long-term sickness and disability are among the main reasons for labour market inactivity for those between 50 and state retirement age. Increasing levels of poor health are experienced by older men from low-skilled occupations (Scales & Scase, 2000:p53); large numbers of whom end up claiming Incapacity Benefits (DWP, 2002:p100) and recent research from the Office of National Statistics suggests that these are more likely to be those with the greatest labour market disadvantage (Barnham, 2002:p309). Many of them end up on sickness and disability benefits, becoming increasingly detached from the labour market in the process; once detached, few return. The costs to the individual in terms of long term physical and mental wellbeing can be devastating (Campbell, 1999:p54-62)..

Undoubtedly ill health increases for all with age but those who are economically inactive are more frequent visitors to doctor's surgeries (Scales & Scase, 2000:p38). Of those who retire early, people from higher occupational groups are consistently better off in retirement and live longer. Conversely those who leave due to ill health are predominantly those with the least labour market advantage and have the lowest survival rate (Meadows, 2002).

Training and information and guidance

Access to employer training is one of the main areas of age discrimination against older workers, especially when it involves training for new roles, and research shows there is a greater unwillingness amongst employers to train those nearing retirement age. Older people are less likely to be taken on for jobs which required additional training but would be recruited if they have the necessary skills or are over qualified.

There are gender differences in access to training with older men less likely than women to receive training (see DWP, 2001; Taylor & Unwin, 2001).

IT training highlighted the difference between older and younger workers; younger workers were more likely to be selected for IT training, whereas older workers tend to deselect themselves for fear of revealing their own ignorance and lack of IT skills. Indeed, many older workers are quick to write themselves off as too old to learn. A survey by Sargant et al (1997) found that the older people are the less likely they are to be engaged in learning. Undoubtedly dominant stereotypes and age discriminatory practices and attitudes are still very much in operation in the workplace. However, many of these are perpetuated by older workers as they exclude themselves; it could be argued that age discrimination in this way acts as a self-fulfilling prophecy (see DWP, 2001; Taylor & Unwin, 2001).

“Age discrimination in employment is a complex interaction of employer and individual stereotypes and pre-conceptions” (Help the Aged, 2002:p5).

It is also important to note that there appear to be few affordable, and therefore accessible, ways of retraining or acquiring new skills, which many older workers say they are keen to gain (see TAEN, 2003); this last point is one area where little research has been carried out.

Caring responsibilities

Women in mid-life are exposed to contradictory signals: on the one hand, they are being encouraged to re-enter or remain in the labour market, whilst on the other hand having more demands placed upon them in terms of informal caring responsibilities. Mooney et al (2002) have termed this the ‘Pivot Generation’ and their research shows that under the age of 65 those providing informal care are mostly women. The older workers who they surveyed said they wanted more flexible working practices to help juggle differing responsibilities. Whilst some of their employers offered some level of flexible working practices, the reality was that this was often blocked by managers as conflicting with the needs of the organisation, and that there were difficulties in balancing caring needs with work obligations. It would seem that combining care and work comes at great personal cost to the individual (Mooney et al, 2003). Although Government is aware of the need to introduce more family friendly working practices by allowing time out to care for elderly relatives (DTI, 2000:p22), recent measures under the Employment Act 2002 only offers limited protection for those with dependant children and no support for dependant elders or partners (DTI, 2002).

Government Policies

Over time Government policies, like pension rules and tax regulations, have varied in their approach to older workers and have served to constrain or enable older worker participation in the labour market (Scales & Scase, 2003). More recently these policies have reflected a desire to encourage and enable older workers to stay, using

both carrots and sticks, many of which are laid out in the recent Green Paper (DWP, 2002b) *Simplicity, Security and Choice*. In this there is a clear focus on 'active' support of those over 50 who are claiming Job Seekers Allowance and Incapacity Benefit, with a 'strong return to work focus'. The 6 month qualifying period for New Deal 50+ is, however, seen by many as too long as many have by then become too detached from the labour market and experience pressure to accept unsuitable and low-level jobs (TAEN, 2003). Furthermore policy does not address older women who give up work to raise families who are not seen as unemployed and are therefore not eligible for official training schemes (Walker & Maltby, 1997)

The carrots come in the form of in-work subsidies, training allowances and increased incentives for those who defer claiming state pensions, although Taylor (2002) is critical of employment subsidies, claiming that they serve to heighten negative stereotypes by separating older workers out as group requiring selective treatment. Disney and Hawkes (2003) suggest that recent tightening of the 'ill-health rules' allowing early exit in public sector pensions policies, such as local government, the fire and police services, have also been instrumental in persuading people to defer retirement (see also Audit Commission, 1997).

Government is also looking to increase the minimum age of retirement of occupational pension schemes to 55. Taylor (2002) found, in a comparative study of public policy across 4 countries, that abolishing or raising mandatory retirement ages as such does not work to deter early exit, as employers find other ways of removing older workers. He argues that campaigns to increase labour market participation amongst older workers are best carried out in collaborative localised form. As mentioned earlier, Government policies, such as the Age Positive Campaign and the upcoming Age Discrimination Act, are beginning to make in-roads into changing attitudes and practices about the older workforce.

Key Texts:

- Barker, G & Hancock (2000) *The Income Dimension*
- Dept of Work & Pensions (2002) *Simplicity, security and choice: working and saving for retirement – a summary*
- Mooney, A; Statham, J & Simon A (2002) *The Pivot Generation: informal care and work after fifty*
- Scales, J & Scase, R (2000) *Fit and Fifty?*
- TAEN (2003) *Challenging Age: information, advice and guidance for older age groups*

- Taylor, P & Urwin (2001) *Age and Participation in Vocational Education and Training*
- Taylor, P (2002) *New Policies for Older Workers*

Increasing labour market participation and reducing age discrimination in the work place are major policy concerns for most western nations and there is an extensive body of literature available on the subject of the older worker and the labour market. A few key texts and studies have been summarised here, the bibliography provides full details of the texts covered here. There is much research being currently undertaken, including new research by CROW.

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APPENDIX 2

Features of the South East Region

The South East Government Region embraces Kent, Sussex, Surrey, Hampshire, Berkshire, Isle of Wight and Oxfordshire. Its economy is dominated by London, and a large proportion of its workforce commutes into London to work. The inner ring – Surrey, Berkshire, North Hampshire and South Oxfordshire - is one of the most prosperous regions of Europe, but the coastal strip suffers serious economic and social problems.

The region is distinct in a number of ways from the rest of Britain, and some of those features are also evident among the 50-69 year old population. In the South East, a higher proportion of people are managers and professionals, and self-employed. They are more likely to be married, employed, highly qualified, in good health and own their own houses, and to earn over £26,000 pa. Conversely, they are less likely to be sick and disabled, unqualified and employed in routine and lower supervisory occupations. A low proportion are from ethnic minorities.. The Region has a lower rate of sickness and disability than any other region.

Most of these characteristics are associated in this survey data with high labour market participation rates, suggesting that the region might expect to continue to have a higher participation rate than the rest of Britain. It already has the highest rate of economic activity among the 50-69 year olds, followed by the East Midlands, both with over 60% in employment

The implication of this is that as the current cohort of people in their 60s moves out of the workforce, their replacements will have more of the attributes which are associated with staying in the labour market.

APPENDIX 3

Research Methodology

Office for National Statistics Omnibus Survey

Information from ONS Technical Report

1. The Sample

Interviews are conducted with approximately 1,800 adult individuals (aged 16 or over) in private households in Great Britain each month. The Omnibus Survey uses the Postcode Address File of "small users" as its sampling frame, all private household addresses in Great Britain are included in this frame. A new sample of 100 postal sectors is selected each month and is stratified by: region; the proportion of households renting from local authorities; and the proportion in which the household reference person is in Socio-Economic Group 1-5 or 13 (i.e. a professional, employer or manager). The postal sectors are selected with probability proportionate to size and, within each sector, 30 addresses (delivery points) are selected randomly.

If an address contains more than one household, the interviewer uses a standard ONS procedure to randomly select just one household. Within households, with more than one adult member, just one person aged 16 or over is selected with the use of random number tables. The interviewers endeavour to interview that person - proxy interviews are not taken.

2. Weighting the data

Weighting factors are applied to Omnibus data to correct for unequal probability of selection caused by interviewing only one adult per household, or restricting the eligibility of the module to certain types of respondent. It should be noted that this weighting corrects for unequal probabilities of selection; it does not attempt to correct for any non-response bias.

Using weighted data

Within the calculation of the weight the base is scaled back to the unweighted total. If a module of questions applied only to a sub-group of the population, for example eligibility was restricted by age, or the module was asked only in England, the weight for the module is calculated for that sub-group and the base, for the weighted data, scaled back to the unweighted figure.

When conducting statistical significance tests, using weighted data, the unweighted base should be used. For tests on the total (module) population the base shown should be used - because this is the unweighted base. However, if sub-groups of the total (module) population are created, for example sub-groups in terms of sex, age-group, region etc., the base shown is the weighted base for that sub-group - because the weight was generated for the whole (module) population. Therefore, when conducting statistical significance tests on these sub-groups, the unweighted base for the sub-group should be used - this can be found by running tables, etc. without applying the weight - in conjunction with the weighted data.

NB: For the purposes of our analyses, we have used unweighted data. Subsequent analyses may use weighted data, which then may differ from the numbers/percentages used in this report. However, they will not vary greatly, and will not affect the substance of the findings.

Weight A - Unit of analysis: Individual

Because only one household member is interviewed, people in households containing few adults have a better chance of selection than those in households with many. Weight A is applied to correct for this unequal probability, and is calculated by dividing the number of adults in the sampled household by the average number of adults per household. The base is then adjusted back to the number of respondents who were interviewed. Weight A is applied to modules which use the individual adult as the unit of analysis.

Effective Sample Size

This method of sampling and the consequent weighting affect the sampling errors of the survey estimates. The effect can be shown by calculating the Effective Sample Size which gives the size of an equal probability sample which is equivalent in precision to the unequal probability sample actually used. The Effective Sample Size will

vary slightly from one month to another with the proportions of interviews in different sized households. On average the Effective Sample Size of the Omnibus Survey is 84% to 86% of the actual sample of individuals, when Weight A is applied. An achieved sample of 2000 individual adults in the Omnibus Survey is equivalent to an equal probability sample of about 1700².

Where individuals are interviewed as representing their households and no weighting is needed, there is no reduction in precision. Where questions relating to the household are addressed only to the Household Reference Person (HRP) or the spouse of the HRP and Weight C is applied, the Effective Sample Size is 86% to 87% of the interviewed sample. The proportion of households in which the selected respondent is the HRP or spouse has varied between 82% and 95% so the sample size for this kind of module will be about 1665 if the total sample is 2000. The Effective Sample Size will be about 1450.

3. Field Work

All interviews are carried out face-to-face by members of the general field force of interviewers trained to carry out National Statistics surveys. Advance letters are sent to all addresses, prior to the interview, giving a brief account of the survey. The interviewing period starts during the last two weeks of the month and continues into the first week of the following month. Interviewers call at all the selected addresses unless a refusal has been made beforehand in response to the advanced letter. The interviewer makes at least three calls at an address at different times of the day and week before coding the household as a non-contact.

As with all National Statistics surveys, a quality check on field work is carried out through recall interviews with a proportion of respondents to make sure that the interviews actually took place with those respondents and that responses to questions are consistent.

4. Calculation of Response Rate

The small users' Postcode Address File includes some business addresses and other addresses, such as new and empty properties, at which no private households are living. The expected proportion of such addresses, which are classified as ineligible, is about 11-12%. They are eliminated from the set sample before response rates are calculated.

A responding individual may be ineligible for certain modules and may not have answered every single question.

The majority of ineligible cases for UniS module were telephone reissues (where the survey was administered by telephone rather than face-to-face). Due to complexity of our module it was omitted from the telephone interview.

5. Response Rate

The response rate is calculated as the number of achieved interviews as a percentage of the eligible sample. 3,000 addresses are selected per month. The weighted response rate for the Total (16+) sample for each wave, and in total is provided below.

Table 8

		Feb-03	Mar-03	Apr-03	Total	Total %
Eligible addresses		2768 (92%)	2755 (92%)	2800 (93%)	8323	92%
	Refusals	693 (25%)	683 (25%)	595 (21%)	1971	24%
	Non-contacts	227 (8%)	257 (9%)	336 (12%)	820	10%
Achieved interviews (Response rate)		1848 (67%)	1815 (66%)	1869 (67%)	5532	66%
Answered UniS Module		1804 (98%)	1778 (98%)	1843(99 %)	5425	98%

² Elliot, D *The use of the effective sample size as an aid in designing weighted samples*. Survey Methodology Bulletin, January

Willing to be re-contacted by UniS (aged 50-70)	360 (66%)	360 (62%)	416 (71%)	1136	66%	

6. Data Processing by CROW

1. Following receipt of the data, SW used SPSS syntax to:
 - Check the filtering for each question
 - Check the logic for each question
 - Check for missing or miscoded information (e.g. missing data or unusual codes)
 - Recode data from all multiple response questions into dichotomous variables for analysis purposes.
2. All checking, filtering and cleaning of the data was recorded in a SPSS syntax file (ONS Omnibus.sps).
3. A number of derived variables were created for analysis purposes from ONS Classificatory Variables (see section below)
4. All of the free text OTHER responses in the UniS module were post-coded by SM, CH, and SW (see ONS Opens v2.xls). Additional codes were created for these questions and the responses have been recoded into the final data set.
5. A number of grouped variables were created from the variables in the UniS module for analysis purposes (see section below)
6. A variable was created for each UniS question counting the number of different types of response, e.g. number of different types of employment transition (see section below)
7. A SPSS syntax file was created to produce relevant cross-analyses and tabulations (ONS Table Code.sps)

7. Methodological problems

For most social science research “retirement” is a fairly straightforward category. However, when researching the behaviour of people in their 50s and 60s the conflicting and overlapping definitions are part of the subject of research, and the difficulties of producing quantitative data from overlapping categories becomes a problem, especially since individuals will report on their own status in ways inconsistent with Government classifications. State Pension Age (SPA) is different for men and women, so overall data on participation among people in their 60s produces an uneven result in gender terms. Some people continue working after SPA and are therefore not “retired” by most definitions. A second group choose to retire from their main job before SPA and will define themselves as “retired” (though some are still in work of some kind). Some become unemployed before SPA and are technically still available for work (3.6% of the age group, classified as “economically active”) but many of these are in reality unlikely to ever be employed again. Since social stigma attaches to “unemployment” some of these will describe themselves as “retired”, and a substantial number are classified as long term sick or disabled. Self reported information can thus be unreliable, while Government classifications can fail to describe the reality.

This study has chosen to examine the population between 50 and 69, which will include a higher proportion of retired women than men. On the key issues we have tested whether those over SPA are significantly different from the overall group. In general they are not, and where there are differences these are noted.

8. The CROW Module – Questions, Variables, Codes and Groupings

M325_1M: In the last 5 years, have you changed your job or working status in any of the following ways?

BY JOB WE MEAN PAID EMPLOYMENT. IF MORE THAN ONE JOB ASK ABOUT MAIN JOB. MAIN JOB IS ONE SPENT MOST TIME IN. *CODE ALL THAT APPLY*

1. Job/role not changed/still in same job
2. Not worked in a paid job (in last 5 years)
3. Changed job – different employer
4. Changed job/role – same employer (e.g. changed department, additional responsibilities, promotion)
5. Reduced/increased working hours/days – same employer
6. Changed to occasional work (e.g. contract/freelance)
7. Became self-employed
8. Started paid work after period of self-employment
9. Started paid work after period when study was my full-time occupation
10. Started paid work after bringing up a family full-time
11. Started paid work after caring full time (e.g. relative/friend)
12. Started paid work after period of unpaid community/voluntary work
13. Started paid work after other period not in paid work (e.g. unemployed, retired, sickness)
14. Became redundant/ unemployed
15. Chose to stop working or to do unpaid work (e.g. voluntary/community work, caring)
16. Retired from main job
17. Became full-time student
18. Other (SPECIFY)
97. Telephone reissue
98. Refused
99. Don't know

Additional codes

19. Still at school / f/t student
20. Stopped due to ill health
21. Retired over 5 years ago
22. Stopped working - pregnancy
23. Took maternity leave
24. Took on additional job
25. Changed shifts
26. Changed role - self-employed
27. Started job whilst studying
28. Changed from temporary to permanent

Grouping – type of change

1. No change(1)
2. Not worked in a paid job (2)
3. Changed employer (3, 28)
4. Changed role/hours (same employer) (4,5,25,26)
5. Changed to SE/Temp/Freelance (6,7)
6. Entered the labour market (8,9,10,11,12,13,27)
7. Left the labour market (14,15,16,17,20,21,22,23)
8. Other (18,19,24)
97. Telephone reissue
98. Refused
99. DK/NR

NB: We need to remember that these are not mutually exclusive groups, and that each individual could be a member of more than one (except no change and not worked). What we are interested in is simply identifying whether or not the respondent has experienced each type of transition.

Count of number of different types of transition

TRANSIT3

1. No transitions
2. 1
3. 2
4. 3
5. More than 3 types
6. Refused/NR

NB: Because of the way that we have set up Q1M, we cannot determine the frequency of job change in the last 5 years, simply because we have not asked the respondents the question 'How many times have you changed job....?'. For example, if the respondent reports that they changed employer, we cannot know from our questions **HOW MANY TIMES** they did this in the last 5 years. This was something that we were aware of when we were designing the questionnaire and we decided that we were less concerned with frequency and more with the incidence of employment transition.

The variable TRANSIT3 counts the number of different types of in the last 5 years (e.g. changed employer **AND** changed role/same employer = 2 types of change).

M325_1a: **And which change was the most recent?** CHOOSE ONE ANSWER ONLY.

ASK IF: > 1 response at M325_1M AND NOT 1, 2, 97, 98, 99 at M325_1M

RECODED by UniS to combine with M325_1M (i.e. if only one response at M325_1M use this for M325_1a)

3. Changed job – different employer

4. Changed job/role – same employer (e.g. changed department, additional responsibilities, promotion)
5. Reduced/increased working hours/days – same employer
6. Changed to occasional work (e.g. contract/freelance)
7. Became self-employed
8. Started paid work after period of self-employment
9. Started paid work after period when study was my full-time occupation
10. Started paid work after bringing up a family full-time
11. Started paid work after caring full time (e.g. relative/friend)
12. Started paid work after period of unpaid community/voluntary work
13. Started paid work after other period not in paid work (e.g. unemployed, retired, sickness)
14. Became redundant/ unemployed
15. Chose to stop working or to do unpaid work (e.g. voluntary/community work, caring)
16. Retired from main job
17. Became full-time student
18. Other (SPECIFY)
98. Refused
99. Don't know

Additional codes

19. Still at school / f/t student
20. Stopped due to ill health
21. Retired over 5 years ago
22. Stopped working - pregnancy
23. Took maternity leave
24. Took on additional job
25. Changed shifts
26. Changed role - self-employed
27. Started job whilst studying
28. Changed from temporary to permanent

Grouping – type of change

3. Changed employer (3, 28)
4. Changed role/hours (same employer) (4,5,25,26)
5. Changed to SE/Temp/Freelance (6,7)
6. Entered the labour market (8,9,10,11,12,13,27)
7. Left the labour market (14,15,16,17,20,21,22,23)
8. Other (18,19,24)
97. Telephone reissue
98. Refused
99. DK/NR

M325_2M: (Thinking about the most recent change to your job or working status, and) using this card as a guide, **what was/were the/your main reason(s) for making that change?** CODE ALL THAT APPLY

ASK IF: Changed job/role, Left labour market or 'other' at M325_1a.

1. Offered promotion
2. Wanted a new challenge
3. Job became too demanding
4. Didn't like workplace environment
5. Wanted less responsibility
6. Wanted more flexible/shorter hours
7. Wanted to develop my experience/skills
8. Didn't get on with boss/colleagues
9. The business/firm closed down
10. Dismissed
11. End of fixed term or temporary contract
12. Compulsory redundancy
13. Voluntary redundancy
14. New post offered more money
15. Wanted to reduce travel time/inconvenience
16. Moved home
17. Decided to take a career break/maternity leave
18. Wanted a less stressful life
19. Wanted to study (not work related)
20. Wanted to study (work related)
21. Wanted to do voluntary/community work
22. Wanted more time for leisure pursuits/travel
23. Left work to take up caring or domestic responsibilities
24. Ill health or disability
25. Reached retirement age for my job
26. Was offered the opportunity to take early retirement
27. Was told to take early retirement
28. Always planned to retire when I did
29. Wanted to finish/stop working
30. Other (SPECIFY)
97. Not applicable
98. Refused
99. Don't know

Additional codes

31. More security
32. Employer re-deployed staff / reorganised

- 33. Career prospects
- 34. Personal factors
- 35. Working hrs changed
- 36. Increase hours
- 37. New responsibilities

Grouping – Type of motivation (thematic)

- 1. Career (1,2,7,20,33,37)
- 2. Workplace (4,8,10,32,35)
- 3. Job (3,5,6,18, 31,36)
- 4. Redundancy (9,11,12,13)
- 5. Retirement (25,26,27,28,29)
- 6. More money (14)
- 7. Personal (15,16,17,23,24,34)
- 8. Leisure (19,21,22)
- 9. Other (30)
- 97. Not Applicable (97)
- 98. Refused (98)
- 99. NR (99)

Grouping – Type of motivation (other)

- 1. Work related (1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 20, 25, 26, 27, 32, 33, 35, 36, 37)
- 2. Lifestyle related (6, 14, 15, 16, 17, 18, 19, 21, 22, 23, 24, 28, 29, 31, 34)
- 3. Positive (1,2,5,6,7,14,15,17,18,19,20,21,22,26,28,29,31,33,36,37)
- 4. Negative (3,4,8,9,10,12,24,27)
- 5. Neutral (11,13,16,23,25,32,34,35)
- 6. Internal (1,2,3,4,5,6,7,8,13,14,15,17,18,19,20,21,22,26,28,29,31,33,34,36,37)
- 7. External (9,10,11,12,16,23,24,25,27,32,35)

Count of number of different types of motivation for change

MOTIV3

- 7. No motivations
- 8. 1
- 9. 2
- 10. 3
- 11. More than 3 types
- 6. Refused/NR

M325_3M: (Still thinking about the most recent change to your job or working status) **which of the following describe what the change meant for you?** CODE ALL THAT APPLY.

ASK IF: Changers and Other only (most recent change) at M325_1a.

1. I have more responsibility
2. I have less responsibility
3. I had to learn a lot of new skills
4. I moved to an advisory/consulting/mentoring/training role
5. My job is now less skilled
6. I now work fewer hours
7. I now work longer hours
8. I now work more flexible hours
9. I changed from full-time to part-time
10. I changed from part-time to full-time
11. I changed from permanent to temporary
12. I changed from temporary to permanent
13. I moved to a new location (building/town)
14. Other (SPECIFY)
15. No significant change
97. Not applicable
98. Refused
99. Don't know

Additional codes

16. I earn more money
17. I earn less money
18. Less stressful, pleasanter work environment
19. Some more skills
20. Pleasant working environment
21. More pressure/stress
22. More travelling
23. Less travelling
24. Less flexible hours
25. Not working

Grouping – Types of meaning

1. More responsibility (1)
2. Less responsibility (2)
3. More skills (3,19)
4. Less skills (5)
5. More time/hours (7,10,12)
6. Less time/hours (6,9,11)
7. Neutral (4,8,13)
8. Other (14,21,22,23,24)

9. No significant change (15, OR 16,17,18, 20 – AND NOT 1-13 and 19)
1. Not applicable (25, 97)
99. Refused/NR (98,99)

Count of number of different types of meaning of change

MEANING3

1. No meaning
2. 1 meaning
3. 2 meanings
4. 3 meanings
5. More than 3 types
6. Not Applicable
7. Refused/NR

M325_5M: Still thinking about the most recent change, and) using this card as a guide, **what, if anything, did you do to help you make the change?** CODE ALL THAT APPLY.

ASK IF: Changers, Leavers, Enterers and Other only (most recent change) at M325_1a.

1. I went on a course paid for by my employer
2. I went on a course paid for by myself
3. I went on a course provided by a government agency
4. I had help from new colleagues/workmates
5. I had career advice/guidance/counselling provided by my employer
6. I had career advice/guidance/counselling provided by an employment agency
7. I had career advice/guidance/counselling provided by a government agency
8. I went on a midlife planning/preparation for retirement/pre-retirement course or seminar
9. I looked for information on the Internet
10. I did some other form of informal learning (e.g. read a book, spoke to friends etc)
11. Other (SPECIFY)
12. Nothing
97. Not applicable
98. Refused
99. Don't know

Additional codes

13. Friends and family
14. Advice from Educational Agency
15. On the job training
16. Voluntary work/Work Experience
17. Further study
18. Other advice

Grouping – Types of support

1. Course (1,2,3,17)
2. Guidance (5,6,7,8,14,16)
3. Workmates/colleagues (4,15)
4. Informal (9,10,13)
5. Other (11,18)
6. No support (12)
97. Not applicable (97)
99. Refused/NR (98,99)

Count of number of different types of support for transition

SUPPORT3

8. No support
9. 1
10. 2
11. 3
12. More than 3 types
97. Not Applicable
98. Refused
99. DK/NR

M325_6: **And which (type of support) was most useful?**

ASK IF: Changers, Leavers, Enterers and Other (most recent change) at M325_1a and >1 response at M325_5M. **CHOOSE ONE ANSWER ONLY.**

RECODED by UniS to combine with M325_5M (i.e. if only one response at M325_5M use this for M325_6)

1. I went on a course paid for by my employer
2. I went on a course paid for by myself
3. I went on a course provided by a government agency
4. I had help from new colleagues/workmates
5. I had career advice/guidance/counselling provided by my employer
6. I had career advice/guidance/counselling provided by an employment agency
7. I had career advice/guidance/counselling provided by a government agency
8. I went on a midlife planning/preparation for retirement/pre-retirement course or seminar
9. I looked for information on the Internet
10. I did some other form of informal learning (e.g. read a book, spoke to friends etc)
11. Other (SPECIFY)
12. Nothing

- 97. Not applicable
- 98. Refused
- 99. Don't know

Additional codes

- 13. Friends and family
- 14. Advice from Educational Agency
- 15. On the job training
- 16. Voluntary work/Work Experience
- 17. Further study
- 18. Other advice

Grouping – Types of support

- 1. Course (1,2,3,17)
- 2. Guidance (5,6,7,8,14,16)
- 3. Workmates/colleagues (4,15)
- 4. Informal (9,10,13)
- 5. Other (11,18)
- 6. No support (12)
- 97. Not applicable (97)
- 99. Refused/NR (98,99)

M325_9M: a) **Do you do, or would you consider, doing, any of the following now or in the future? (retired)**

b) When you retire would you consider doing any of the following?

(unemployed)

c) When you retire from your present main employment, would you consider doing any of the following? (working) CODE ALL THAT APPLY.

ASK ALL

VOLUNTARY WORK MEANS UNPAID EXCEPT FOR EXPENSES.

- 1. Work full-time in the same industry as before
- 2. Work part-time in the same industry as before
- 3. Set up my own business - same industry as before
- 4. Set up my own business - new industry
- 5. Work full-time in a new industry
- 6. Work part-time in a new industry
- 7. Work occasionally in the same industry as before (short periods or particular contracts)
- 8. Work occasionally in a new industry (short periods or particular contracts)
- 9. Do unpaid voluntary/community work
- 10. None of these

Grouping – Types of employment

1. Full time (1,5)
2. Part-time/occ work (1,6,7,8)
3. Voluntary work (9)
4. Own business (3,4)
5. Nothing (10)
6. New Industry (1,2,3,7)
7. Same industry (4,5,6,8)
8. NR (98,99)

Count of number of different types of activities in retirement

NWORK1

13. Nothing
14. 1
15. 2
16. 3
17. More than 3
99. DK/NR

M325_10: **Researchers at Surrey University in the Department of Educational Studies will be conducting further research into peoples' attitudes to work when they are in their 50s and 60s.**

They would like to ask your permission to be contacted by them in the future. That is sometime over the next two years.

ASK IF: Aged 50-69

INTERVIEWER: If necessary, assure the respondent that the information given will be used for statistical research purposes only and will not be presented in a way which could be associated with names and addresses. Also that their name and address would not be passed on to any other organisation apart from the one they have agreed to.

1. Permission given
2. Permission refused

Base sizes for each question (20+ population)

Table 9

Question	Topic	Eligible	Unweight ed Base	Weighted Base
M325_1M	Transitions in last 5 years	Total sample	5204	5076
M325_1Ma	Most recent/only transition	Total sample	5204	5076

M325_2M	Reasons for transition	Changers, Leavers, and Other	2435	2443
M325_3M	Meaning of transition	Changers and Other	1613	1687
M325_5M	Support for transition	Changers, Leavers, Enterers, and Other	2672	2693
M325_6	Most useful/only support	Changers, Leavers, Enterers, and Other	2672	2693
M325_9M	Activities in retirement	Total sample	5204	5076
M325_10	Willingness to be re-contacted by UniS	All aged 50-69	1715	1709