


# CIPD

Championing better  
work and working lives

## Research report

February 2015



Managing an  
*age-diverse* workforce:  
What employers  
need to know

The CIPD is the professional body for HR and people development. The not-for-profit organisation champions better work and working lives and has been setting the benchmark for excellence in people and organisation development for more than 100 years. It has more than 135,000 members across the world, provides thought leadership through independent research on the world of work, and offers professional training and accreditation for those working in HR and learning and development.

# Managing an age-diverse workforce: What employers need to know

Research report

## Contents

Foreword	2
Introduction and research approach	3
<b>Part 1</b>	
Summary of key findings	4
Research findings	
1 Work priorities across age groups	5
2 Awareness and perceptions of age diversity	6
3 Benefits and challenges of an age-diverse workplace	7
4 The role of organisations in supporting age diversity	10
5 The extension of working life	13
<b>Part 2</b> – Organisational case studies	14
<b>Part 3</b> – Conclusions	21
References	23
<b>Appendix</b>	
Part 1 research sample	24
Part 1 focus group discussion guide	26

## Acknowledgements

We would like to thank the Qualitative Research Team at YouGov and Karen Higginbottom for their contributions to this report. We would also like to thank all of the participants who attended focus groups and the organisations that provided case study material: Enterprise, HMRC, McDonald's and Santander.

# Foreword

Fact – even though more older people are staying on at work rather than retiring, there are three times as many unemployed older workers as there are young people not in education, employment or training – 2.9 million (DWP 2014) compared with 954,000 (ONS 2014). This is a huge pool of untapped potential talent that employers are missing out on when it comes to recruitment. While the retention of older workers is gaining traction, unemployed older people struggle to find jobs.

Research shows (CIPD 2014) that more than ever employers value older workers and are positive about letting people work for longer rather than losing them unnecessarily as retirees. However, while provisions for employee health and well-being are seemingly strong, more practical steps could be taken to support the extension of working life, with three in ten employers currently not providing any support in this area. As the economy grows and the average age of the population increases, employers will also need to develop proactive approaches

to recruitment to make sure they are age-diverse and develop a balanced employee age profile. For the first time there will be more than five generations working together in organisations, enriching the diversity of experiences, perspectives, personal values and ideas and creating challenges and opportunities which employers will need to be smart to manage.

This report is a follow-up to our survey report *Managing an Age-diverse Workforce: Employer and employee views* (CIPD 2014), which once again provides a useful dual perspective (from employees and employers) on age diversity at work. Part 1 synthesises qualitative data to describe what people themselves feel and experience when working with age-diverse colleagues and gives employers important new and unique insights that will help them to nurture more productive workforces and avoid conflict. Part 2 showcases some interview-based case studies from organisations that are currently focusing on age-diverse opportunities at work and includes their top tips for progress.

As Ros Altmann, the recently appointed government czar for older workers, advocates, employers need to *recruit, retrain* and *retain* older workers to make sure they are not missing out on skills and talent. She says:

*'I welcome this new CIPD research report. It outlines how employers can benefit from workforces that are age-diverse and recommends actions that can deliver success. Failing to pay attention to the impact of ageing populations is short-sighted and could well put UK businesses at a disadvantage in the face of global competition. In addition, enabling longer working lives can improve both individual and national income.'*

**Dianah Worman OBE Chartered  
FCIPD  
Public Policy Adviser, Diversity**

**Claire McCartney BA MA MSc  
Resourcing and Talent Planning  
Adviser**

# Introduction and research approach

This research report is in three parts and provides two different perspectives.

Part 1 is a qualitative study conducted in April 2014 for the CIPD by YouGov. It synthesises two two-hour, face-to-face focus groups with employees in different age brackets and across different regions to meet the research objectives of this study. Across the two focus groups we spoke to 16 respondents from a range of

industries, including hospitality, education, retail, wholesale and finance. We covered a mix of organisation sizes, from smaller organisations with 5–9 employees to large organisations with 500+ employees. Respondents were working in middle management roles or below, ensuring that their perspectives were from the point of view of an employee, rather than an employer. A full sample overview is included in the Appendix.

<b>Focus Group 1: London</b>	<b>25–40-year-olds</b>	<b>29 April, 6:30–8:30pm</b>
<b>Focus Group 2: Leeds</b>	<b>40–65-year-olds</b>	<b>1 May, 6:00–8:00pm</b>

The key research questions included, but were not limited to:

- understanding how age-diverse employees believe their organisation to be
- examining the key benefits and challenges of an age-diverse workplace
- understanding what organisations can do to support age diversity from an employee perspective.

Part 2 provides a summary of interviews drawn from organisation case studies conducted during spring and summer 2014. The interviews were semi-structured and were conducted with senior HR professionals in four different organisations: Enterprise, HMRC, McDonald's and Santander.

Part 3 draws conclusions and sets out recommendations.

# Part 1

## Summary of key findings

### **We found a strong link between life stage and working experience on work priorities:**

- Spontaneously, younger age groups focus on values such as trust, recognition and freedom, while older age groups focus on achieving work-life balance and flexibility.

### **In general, employees believe there is a good degree of age diversity in their organisations:**

- Though some feel that their organisations are biased towards certain age groups. This is often in line with historical impressions of certain industries.

### **Age diversity is viewed in a mostly positive light across the groups:**

- Few feel that age diversity is solely responsible for challenges faced in the workplace.

### **Knowledge-sharing, different perspectives and enhanced customer experience were identified as key benefits of age diversity:**

- There is widespread appreciation that both younger and older colleagues are able to add value in these areas.
- Younger colleagues feel that

older age groups can share practical experience and expertise, while older colleagues look to younger groups for skills training and new working methods.

- Different perspectives are seen as a way of harnessing new ideas and working styles.
- Those working in customer-oriented organisations value the ability to match their customers to colleagues. Age is just one of the ways in which they can do this.

### **Few feel that there are many challenges directly related to age diversity. However, a lack of shared values and interests is an area that some feel could cause tension:**

- As work priorities vary across age groups, there can be widely disparate values and interests across the age groups. This causes friction when colleagues feel that others are focusing on their own interests at the expense of the working environment.
- Examples were given of cases where younger employees have treated their job as a stepping stone to other things, or where older employees are seen to be simply waiting things out until retirement.

### **In terms of the role of organisations, informal practices are favoured, as those we spoke to feel that formal practices have the potential to make age diversity into ‘more of an issue’:**

- Mentoring and shared learning were identified as areas that employers should encourage to promote age diversity, linking back to the emphasis employees place on knowledge-sharing as a key benefit.
- Some we spoke to feel that this is an area that their organisation is currently overlooking, focusing instead on older age groups training younger groups.

### **Few feel that their organisation is taking actions to actively encourage those nearing retirement to continue working:**

- Both flexible working options and job-sharing are practices that employees feel should be encouraged to support the extension of working life.

# Research findings

## 1 Work priorities across age groups

During the session, respondents were asked to reflect on their experiences of age diversity in their organisation. As a warm-up, we asked employees to tell us about what they are looking for from their job and what their priorities are when it comes to work.

We found that employees across age groups often have different priorities when it comes to work. Those in the 25–40 age group focus on values that will enable them to feel appreciated within the workplace: trust, recognition and the freedom to make decisions without being micromanaged are key themes that came out here:

*‘Having management that don’t undermine you and that trust you to do your job well. Not being micromanaged.’* (Kerri, 37, financial officer)

*‘A dynamic environment where you can be heard.’* (Gemma, 28, fundraising manager in charity)

In contrast to this, those in the 40–65 age group tend to focus on the more practical arrangements that their role offers. Top of mind for this group are flexible working hours, being able to achieve a work–life balance and a cohesive working environment:

*‘The hours. Being able to work around my children.’* (Debbie, 52, works in retail)

*‘There is flexibility in how you work. Working from home is encouraged where it suits. There are a lot of opportunities for work–life balance where it suits.’* (Mark, 55, accountant at local council)

While many values and priorities are shared across groups, we found a strong link between life stage and working experience on work priorities. The differing emphasis across these two groups highlights the potential for both benefits and conflicts when it comes to age diversity in the workplace. These themes will be explored further in the following sections.

*‘We found that employees across age groups often have different priorities when it comes to work.’*

## 2 Awareness and perceptions of age diversity

*‘While most feel that the broad spectrum of ages is covered in their organisation, some believe that their organisation is more biased towards particular age groups.’*

### **Do employees feel they work in an age-diverse workplace?**

Few had come across the term ‘age diversity’ and the issue is not top of mind, as opposed to other areas of organisational diversity such as gender or ethnicity. Employees had not heard the term used by management in their workplace:

*‘It’s a very politically correct term. It’s not something I hear much.’*  
(Kerri, 37, financial officer)

However, when probed, most employees we spoke to feel that they work in a workplace with a good degree of age diversity. Across both groups, most employees feel that there are younger and older generations in the organisation, as well as their immediate age group:

*‘I find that I’m in the middle. You’ve got a lot of younger people, and the older guys who are usually self-employed.’* (Shaun, 34, electrician)

*‘I work for a confectionery company part-time. There’s everything from teenagers right through to 60.’* (Debbie, 52, works in retail)

*‘In my work there is a girl who is a bit younger than me and a guy in his 40s. The guy who runs it is in his 60s.’* (Jack, 31, works in wholesale)

### **Differences across sector**

While most feel that the broad spectrum of ages is covered in their organisation, some believe that their organisation is more biased towards particular

age groups. For example, one individual working in construction spoke of the Apprenticeship scheme in his organisation that enables younger age groups to join, but feels that older age groups are less well represented in the company. On the other side, an individual working in a local council with 500+ employees sees his organisation as more biased towards an older workforce, many of whom have worked there for many years:

*‘I work across three councils at the moment. Individually they are quite big organisations. In my direct team there are eight people. They all tend to be older than me at the council.’* (Charlie, 32, works for local council)

These industry differences tend to be in line with survey findings, with those in retail, construction and hospitality commenting on the bias towards young employees and those working for the council and public sector emphasising a bias towards older age groups in their organisations:

*‘I work in a restaurant. The whole company is quite big but in our restaurant there are about 20 of us. The age range is from 20 or late teens to early 40s. I’m in the middle.’* (Ana, 32, restaurant team leader)



# 3 Benefits and challenges of an age-diverse workplace

Overall, age diversity is seen as a positive for both the organisation and the individual. There is widespread appreciation that a workplace with only one generation is less effective and is not as enjoyable to work in. While stereotypes of ‘younger’ and ‘older’ workers do exist, and are seen as relevant in some instances, overall employees tend to enjoy working with colleagues of different ages.

Those we spoke to feel that age diversity in the workplace presents few real challenges, with the challenges that were brought to light often being attributed to conflicts of personality or hierarchical management structure rather than solely an issue of age diversity:

*‘There’s a stereotypical view of a younger person and an older person. But there’s people changing that perception all the time. There’s no one perception.’* (Gemma, 28, fundraising manager in charity)

## Key benefits of age diversity

### 1 Knowledge-sharing

Knowledge-sharing was identified as a key benefit of an age-diverse workplace across both age groups. Employees across the range of ages display an appreciation that colleagues across the mix of ages have different skills and knowledge sets which are valuable, both to other colleagues and the organisation as a whole.

Among the 25–40 age group, many feel that they can learn

from older age groups and often define this knowledge in terms of experience and expertise. Those in this age group feel that older colleagues are valuable in sharing their experiences ‘on the job’ and are often able to share practical advice which they wouldn’t have experience of otherwise:

*‘I tend to work on quite big projects that go on for a long time. I could work on a project that could take 18 months to two years to complete and I’ve only been at the council for three years. People who’ve been there a long time have been through that process before so they’ve got actual rather than theoretical experience. They have practical examples of things that can happen so you can learn a lot.’* (Charlie, 32, works for local council)

*‘In my line of work, there are a lot of tactical, strategic things you can pick up on, so knowledge-sharing is useful. The kind of thing that common sense wouldn’t provide. There are certain things that you can’t learn unless someone tells you how it works. There is no book on it.’* (Jack, 31, works in wholesale)

Those in the 40–65 age group also feel that they could learn from the skill-sets of younger employees. Younger colleagues are often seen to have knowledge around new practices, gained from recent training, as well as specific skills relating to IT and social media:

*‘ICT skills for example. I know I’m not good at this. I think if you have got an open mind you can learn a lot.’* (Kully, 42, works in the NHS)

Knowledge-sharing is felt to provide a space for true collaboration across age groups, with recognition that all employees stand to gain. This is felt to be particularly relevant in the context of the changing working landscape, with continuous developments in technology and the expectation of changing job roles often encouraging employees to think about developing their wider skill-sets.

### 2 Different perspectives

Age diversity is seen to bring to light different perspectives in the workplace, tying in with knowledge-sharing in many cases.

Different generations are felt to have varied approaches to work, which bring about new perspectives. Younger groups are sometimes associated with ‘quick’ reactions and thought processes, while older generations are associated with more measured reactions, utilising their experience. It was felt that there is a role for both approaches in the workplace:

*‘Being able to do things quickly, that’s what younger people have. They do things so fast, in a process-driven way.’* (John, 53, teacher)

Many feel that different types of knowledge bring about a range of perspectives on how to do things. This can cause tension within the workplace when employees feel that these perspectives are not being recognised and taken into consideration. In the example below, one employee felt that her perspective was not appreciated because of the age gap between

her and her manager – though it's a personality and trust issue too:

*'I commissioned a new website for the company, and I cut it down to six pages. Then my 55-year-old boss swooped in and said he wanted to pay eight times the amount and make it much bigger, even though that's not what the company needs.'* (Kerri, 37, financial officer)

However, generally those we spoke to see the opportunity to interact with colleagues with a different way of looking at things as a positive.

These different perspectives can bring about fresh ideas too, as seen below:

*'When I first started working with these guys, they were doing*

*everything with bits of paper. They were spending thousands of pounds on postage every month. And I've finally got them to change. But then again, learning the ropes from them is really important too.'* (Jack, 31, works in wholesale)

### **3 Enhanced customer experience**

Those working in customer-oriented organisations spoke of the enhanced customer experience that can be brought about through age diversity. While personalities are seen as key to building relationships with clients, making sure that the age mix in the organisation can complement those of the customer was felt to be important:

*'When I'm out at meetings I spend so much time with our medical director, who's in his early 60s, and the people we're meeting are*

*always older. But they have said they enjoy working with my team because we're younger, it changes the dynamic and makes it less serious somehow.'* (Gemma, 28, fundraising manager in charity)

*'It's not just an age thing; it's a gender thing, a personality thing. But it helps you to pick the best people to match to the specific person you're working for.'* (Gemma, 28, fundraising manager in charity)

Some mentioned their own experiences of age diversity as a customer, and spoke of the increasingly age-diverse workforce they have seen in supermarkets. Those in the older age group in particular feel that this is a positive, as they have seen more older employees working in stores and link this to good customer service.

## **Case study**

### **Gemma, 28, works for a large charity organisation (300+ in the head office) as a fundraising manager**

Gemma believes her organisation is fairly age-diverse, though more biased towards younger employees, particularly in the fundraising roles. She feels there is a disconnect between the workforce and the clients they deal with day-to-day:

*'Fundraising is on the whole younger, so people under 30. But the vast majority of people we deal with in my area of fundraising are over 50.'*

She therefore sees age diversity as an issue that is particularly relevant in her line of work because ensuring that there are a mix of ages can help to match clients with colleagues with the right levels of experience:

*'In terms of relationship management within fundraising, having a mixture of ages and genders is really positive as we can ensure we use the right people in the right situations. More mature colleagues can command more respect from older contacts, but some contacts love working with younger colleagues.'*

Gemma manages a small team of three and feels that there is a particularly good balance of ages within her direct team. Both her colleagues are older, one significantly so (49). While at first she was nervous about managing an older employee, these concerns turned out to be unwarranted and they have built up a great working relationship. Crucial to this is respect and an appreciation that everyone has different priorities when it comes to work; she is aware that older colleagues can have other commitments and feels that you can't judge someone's role by their age:

*'After a week or so people see what I'm like in my job and then I earn their respect. There is a perception at the beginning that I'm very young. Maybe it's me feeling that, but it seems to work well in this current role.'*

She's never received training from her organisation on managing a diverse team, and doesn't feel there is an urgent call for it. However, she is keen to see more opportunities for knowledge-sharing across the age groups.

## Key challenges of age diversity

### 1 Lack of shared interests and values

While many do not think that there are any real challenges that could be directly associated with age diversity, a lack of shared values and shared interests are two areas where some feel age diversity does play a role.

This reflects back to the work priorities identified in the first section. Employees across the age groups are not always looking for the same things from their work. For example, while younger employees may treat their job as a stepping stone to other things, for others it is a career and livelihood.

This is seen as more pronounced in certain industries such as retail and customer services, where it is felt that there can be large numbers of younger workers who are not treating the job in the same way as older workers. This is linked back to age and the life stage that employees are at and can cause divisions and conflict within the workforce.

*'Their attitudes to work are different. I think sometimes younger people can get a bit distracted.'* (Noel, 58, housekeeping)

*'There's a potential for conflict because of some of the different attitudes that can exist between the difference age ranges. Sometimes*

*the younger ones come in with a different attitude and they think their way is right; they don't want to listen.'* (Angie, 47, PA)

Though equally people feel that different interests and values can be seen as a positive too, offering new perspectives and a chance to engage with people of different backgrounds who you wouldn't come across otherwise:

*'Generally I like working with older people. I've had people who I'd look up to and hope I was like them when I'm 45. You meet people that you wouldn't normally socialise with.'* (Kim, 29, administrator)

## Case study

### Noel, 58, works in housekeeping in a hotel chain

Noel works in housekeeping and enjoys the flexible working hours this offers. It's manual work but he does enjoy the camaraderie and has been doing it for a number of years.

There are five people in his team and a mix of ages and backgrounds. However, Noel feels that the service industry attracts a predominantly younger workforce that often considers the job as just a way of earning cash before finding another job. These colleagues have different priorities and they sometimes don't care about the job as much and turn up late:

*'Lack of values, different values. Because they just don't care.'*

In this sense, there are conflicts within the workforce. The fact that younger employees don't treat the job with as much respect causes offence and has shaped the way he treats younger colleagues – he now prefers to work with older colleagues:

*'It's the same every day. They've all got attitude problems now. They can't be bothered.'*

He doesn't think that the hotel has taken any steps towards supporting age diversity; they hire whoever is looking for a job. He does feel that his industry could benefit from more age diversity in the workplace, perhaps taking note of the examples set by supermarket chains and making a conscious effort to hire older staff and represent a greater range of age groups.

## 4 The role of organisations in supporting age diversity

*‘In terms of the issues facing organisations relating to age diversity, ensuring that recruitment takes into account age diversity and avoids age discrimination were identified as key.’*

As we have seen, employees we spoke to feel they work in fairly age-diverse organisations and have presented mostly positive experiences of age diversity in their workplace. Therefore, in terms of the role of organisations, employees often find it difficult to see ways in which management could promote and support age diversity without ‘making it into an issue’.

In line with this, informal approaches are felt to be more suited, rather than formal. This comes with the exception of age discrimination, where formal approaches are clearly favourable.

In terms of the issues facing organisations relating to age diversity, ensuring that recruitment takes into account age diversity and avoids age discrimination were identified as key. Aside from this, providing opportunities for knowledge-sharing across the age groups and promoting a culture that encourages this are areas that employees feel their organisation could play a role in.

### **Age discrimination in the workplace**

Employees identified two issues in terms of age discrimination in the workplace. Firstly, they spoke of the changing landscape of the jobs market and the impact that this may have on age diversity in the workplace. They see more opportunities and openness towards career changes later on in life, changing the dynamic of the working environment as older people enter into more junior roles. However, they feel that

there are often issues with age discrimination at the recruitment level relating to this. Older employees looking to change career and enter more junior roles could be restricted by their age during the recruitment process, while in the workplace there are now few restrictions on younger employees managing older team members:

*‘People may want a career change, not many people stay in the same job anymore. They may want to do something different so there shouldn’t be limitations.’* (Kerri, 37, financial officer)

*‘Age shouldn’t prevent someone from starting at the bottom.’* (Jack, 31, wholesale)

Secondly, employees identified the upper age group – those above 65 – as a group who could experience age discrimination within the workplace on some level. In these cases, inability to keep up with new technology and the pace of work have caused older employees to be overlooked and excluded, even with their extensive knowledge of the role:

*‘An old colleague of mine, she knew the job inside out but she’d be relying on help with the systems. She probably needed to stop work. She couldn’t keep up with it. We all tried to cover for her, but we couldn’t always be there helping her. We eventually realised that she needed to retire.’* (Angie, 47, PA)

This can be aggravated by the fact that after-work socialising is

often a domain of the younger age groups, with older colleagues therefore excluded and promoting a more ‘them and us’ culture:

*‘Younger people are going out. Older people just want to go home.’*  
(Kim, 29, administrator)

To counteract this, some expressed a need for organisations to push training amongst the top-end generations, rather than continuing to focus training on younger age groups.

### **The role of line management in supporting age-diverse teams**

A number of employees we spoke to are currently managing older colleagues. While these individuals have established good working relationships with those they manage, they expressed some concerns over this line management responsibility initially, finding the experience slightly ‘awkward’ and feeling a sense of ‘inferiority’ in this position. This suggests that more advice could be given to line managers in these positions:

*‘I find it quite difficult managing people who are older because people tend to have been there years and years. It can be difficult to manage someone who’s been in the council for 20 years. I just always think, “you must know so much more than me”.’* (Charlie, 32, works for local council)

*‘One of the people I manage is 49, one is 29 and I’m 28. So that’s quite an interesting experience but we have a great working relationship and they have my respect and vice versa. But at the beginning I was quite concerned being the youngest.’* (Gemma, 28, fundraiser manager in charity)

However, those we spoke to feel that having a younger line manager is not a problem – some feel that younger groups have more time to focus on these roles, whereas older colleagues are looking to take a step back.

### **Access to development and progression opportunities**

Attitudes towards access to development and progression opportunities are mixed and often relate to the size of the organisation.

Those working in larger organisations tend to feel that all age groups are given the same access to training and do not see themselves as restricted in terms of their progression. They spoke of all age groups being actively encouraged to participate in training sessions, with mandatory training across age groups doing much to enhance this:

*‘We have mandatory training that we have to have. It doesn’t matter what age group you are. There are opportunities to do things like an NVQ. I would have an opportunity to do that as much as a 20-year-old.’* (Kully, 42, works in the NHS)

For those working in smaller organisations, career development and progression opportunities are more of an issue. As training tends to be run on a more ad hoc basis in these organisations, access to training tends to be reserved for younger groups, with older colleagues feeling that they have to push harder for the same access:

*‘I would have to express a real interest.’* (Brenda, 55, works for online pharmacy)

Encouraging a culture that appreciates the continuing need

for training and development amongst all age groups is seen as an important role for organisations.

### **Encouraging knowledge- and skills-sharing**

During the discussion, employees were shown four examples on cards of ways in which organisations could help to support age diversity:

- 1 getting everyone to understand the importance of age diversity and encourage discussion
- 2 line manager training
- 3 awareness training for age-diverse teams
- 4 mentoring and shared learning.

Mentoring and shared learning was identified as most beneficial, linking back to the emphasis employees place on knowledge-sharing as a key benefit of age diversity. As it currently stands, some – particularly those in the 25–40 age group – feel that their organisation does little to encourage this. From their experiences, training and skill-sharing sessions are associated with a ‘top-down’ approach, with the expectation that older colleagues would be running the sessions rather than a more mixed approach:

*‘Any managerial training is going to be run by head office. They’re not going to be young. They’re all going to be over a certain age and there is no one younger than that.’*  
(Junior, 28, retail)

As we have seen, the 25–40 age group in particular prioritises respect and being listened to as some of the key things they are looking for from their job, with job satisfaction being significantly

lower amongst those who don't feel valued in this way. Promoting shared learning across the age groups is felt to provide a way of meeting these priorities. This is particularly key in organisations where those higher up are from older age groups. Employees related the experiences below as examples of good practice for organisations looking to promote knowledge-sharing across age groups:

*'I used to have lunch and learn in my old company. I was the SAP Champion because I was in a junior position and I was eager to prove myself. Eventually I taught some of the older people who hadn't picked it up. It made me feel really good about myself and improved my confidence.'* (Kerri, 37, financial officer)

*'We have a lunch and learn thing every two weeks where different*

*people from within the team can explain something of general interest. On the whole it tends to be the younger people.'* (Charlie, 32, works in local council)

## Case study

### John, 53, teacher and head of department

John works in a large school with 250 members of staff. Overall, there are more younger staff members than older, but he feels there's still a good mix of different ages.

He enjoys the enthusiasm and dynamism of working in an environment with younger colleagues but thinks he can add to their knowledge too in terms of his years of experience in the job. As head of department, he sees his role as shielding some of the younger employees from criticism they may receive from parents, amongst other things:

*'People's abilities differ and each brings a set of skills that is valuable to the workplace. The challenge is to merge them together.'*

Younger colleagues can bring forward new ways of working – for example they have often been taught new practices and teaching styles that older colleagues have not come across:

*'I've been teaching so long that the new things that are coming in are like reinventing the wheel. As head of department, fortunately the people under me are enthusiastic and I just let them loose with it. They help to drive the department forward. Also, they've got very good IT skills.'*

In terms of the training and career development on offer, John feels that this is open to colleagues of all ages within the school and the industry as a whole. Within his department, he runs training sessions as part of their Monday morning meetings, which are skills oriented and can be led by any member of the department, whatever their age and role. He thinks this is a key example of knowledge-sharing across the age groups.

## 5 The extension of working life

Many of those in the 40–65 age group are actively planning their retirement and are not looking to stay on after 65 if possible. They do not see their organisation doing anything to actively encourage those nearing retirement to continue working.

In the example of a teacher below, the school is not felt to be a suitable environment once reaching retirement age because of the pressures of the job and attitudes amongst the children. In this respect, the school is seen as doing little to encourage employees to stay on – more part-time, flexible work is not offered by the school or seen as feasible by the employee because of the demands of the job:

*'If I could go to 60 teaching, I would do but I'm not going to stay there. I've seen members of staff stay there and they've become a laughing stock. I have seen teachers crack up.'* (John, 53, teacher)

However, some employees in this group have been able to move towards more flexible working hours, enabling them to refocus their work–life balance.

For those in the 25–40 age group, retirement is a distant future and there is a lack of awareness around the practices to support the extension of working life in their organisations. However, there is awareness amongst those in this age group that they will need to continue working for longer than previous generations. Many could not imagine retiring in the traditional sense; they imagine

that they will continue to work and hope that they will be able to focus more on the specific areas they are passionate about:

*'Retirement is not something I think about because I've got my entrepreneurial pursuits. I've put so much work into it, that I can't see myself giving that up.'* (Kerri, 37, financial officer)

*'I can't imagine doing nothing, though. I'm not sure I'd find other things to do.'* (Gemma, 28, fundraiser manager in charity)

In this context, organisations are felt to need to promote policies that enable employees to extend their working lives while keeping engagement high. Some drew on examples they have seen in their organisations of these practices:

*'We used to have a job-share receptionist. One was a working mum and one was an older woman, and she called that her retirement job. She still wanted to see people, talk to people. I'd do something like that.'* (Kim, 29, administrator)

*'I just hope I've got enough money to be able to do it. A state pension isn't going to cut it. We need more flexible working arrangements. Job-sharing. Stuff like that.'* (Jack, 31, works in wholesale)

Both flexible working options and job-sharing are practices that employees feel should be encouraged to support the extension of working life and enable employees to carry on working in a way that suits both themselves and the organisation.

*'Many of those in the 40–65 age group are actively planning their retirement and are not looking to stay on after 65 if possible.'*

## Part 2

# Organisational case studies

While Part 1 of this report has focused on employee attitudes to workplace age diversity, Part 2 balances that out by focusing specifically on employers' perspectives and practices. Structured interviews were conducted with four organisations from different industries and sectors to explore, amongst other things:

- how important age diversity is to their organisation
- how age-diverse they currently are
- some of the benefits and the challenges posed by age diversity
- practical strategies for enhancing and supporting age diversity for business success now and in the future.

### Enterprise

Ageing demographics are not a concern for the US-owned car rental firm Enterprise, which has been operating in the UK for 20 years. *'The average age of employees within the firm is 27 years old, although in our corporate office we're a bit older, with the largest percentage of our workforce between 35 and 41 years old,'* comments Leigh Lafever-Ayer, HR director, UK and Ireland, for Enterprise.

At the heart of its strategy for attracting talented employees is its graduate management programme, which runs all year round, explains Lafever-Ayer: *'This graduate programme is open to people of all ages. We've had candidates coming to us later in their careers that have done very well in this programme. We don't put an age limit on this programme and we look for competencies.'* In terms of recruitment channels to attract an age-diverse workforce, Enterprise recruits through universities, job boards and its strong employee referral programme. This year, the employee referral programme is responsible for 28% of new hires at Enterprise in the UK, explains Lafever-Ayer: *'We've had employees refer their older relatives. We give employees a paid bonus if they refer someone and they are hired.'*

Enterprise uses different recruitment marketing channels to create a brand that is attractive to different ages, explains Lafever-Ayer:

*Our website may be more about our graduate programme but if we wanted to attract working mothers, we would use a different channel. We advertise jobs through different social media channels as well as promoting jobs through different organisations, such as 'Where Women Work' and 'WorkingMums'. We are constantly looking at how we improve our age profile.*

Within the UK, the average age of employees in Enterprise's business support unit has increased since the firm introduced homeworking policies in 2012, says Lafever-Ayer:

*At our call centre environment, we used to have younger people in their first professional job, but since we've introduced the homeworking scheme, that has increased our average profile to 29–34 years old. It used to be 24–28 years old and we now have over 100 homeworkers.*

For Enterprise, one of the potential challenges of employing a younger workforce is when a younger manager manages an older employee, comments Lafever-Ayer: *'We might have a younger manager*



## Enterprise (continued)

*managing someone in their 50s. If you're an inclusive leader, you can figure out how to do that.'* Enterprise addresses potential multi-generational conflict through its extensive diversity training for managers:

*This training addresses issues around generational diversity. By the time an individual is a middle manager, they have gone through three face-to-face diversity trainings as we want our managers to be equipped to be as inclusive as they can. We started talking about generational diversity ten years ago and this was driven by our age profile increasing in the US.*

Diversity is one of the fundamental values of Enterprise and teaching managers to recognise unconscious bias is core to that, adds Lafever-Ayer: *'We've a team of 39 internal diversity trainers who are certified to deliver high levels of diversity training and employees go through three levels of diversity training.'*

One of the key challenges facing many businesses is the loss of corporate 'know-how'. Enterprise has long had a culture of retaining knowledge through internal promotions. Ninety-nine per cent of its promotions are internal and it's vital to developing people and retaining knowledge, remarks Lafever-Ayer: *'By promoting within, you get to have a certain number of people in the business for a while and a lot of best practice is passed down to communicate our vision and story.'* Enterprise has employees who are drawing a pension and working part-time at the firm and has employees working beyond retirement age.

The culture of continuous development is deeply embedded in the organisation because a manager's performance rating is partially assessed on how well they develop their employees, explains Lafever-Ayer: *'Employee development is as important as growing your business for us. We want to see that managers are growing their talent.'* Enterprise's learning and development budget is viewed as an investment in employees and has increased significantly this year because of investment in developing a leadership programme that enhances their current one, she adds.

Enterprise's approach to age diversity is about supporting employees through different life stages by offering flexible working options, explains Lafever-Ayer:

*As Generation Y employees get older, we find their needs are changing and, for us, it's about helping them to transition into parenthood. We're also all about customer service and our homeworking has been driven by the customer service angle. We have increased the operation of our rental branches to seven days a week and that has enabled us to run shift patterns that have been beneficial to our employees. In our corporate office, we've offered different shift patterns where some employees come in early and certain employees come in late. We've had alternative working arrangements available for years before the legislation came into force in the UK.*

Looking ahead, Lafever-Ayer wants to focus on how to support employees through parenthood and other life stages by exploring flexible working options: *'For Generation Y, this will be as much about men as women who want flexible time with their families.'*

### Supporting an age-diverse workforce: five top tips

- Organisations need to understand their generational diversity and that is all about having the right data. Measure the age profile of your workforce. Measure and look at your age profile on an annual basis to see what is changing.
- Help managers to overcome the challenges of age-diverse teams through inclusive leadership training.
- Open up your recruitment channels and explore whether you can increase the diversity of your recruitment channels. Enterprise is looking at whether we could profile more people who are older.
- Succession planning – for many organisations, succession planning is critical to keeping and retaining corporate 'know-how' and is often ignored.
- Engage with each generation on how their team can work together best: one generation might find it useful to network and share knowledge with colleagues in a social media group, while others may prefer face-to-face interaction. Help them strike a balance.

## HMRC

For HMRC, data about its workforce has proved key in dispelling myths about age and helped to highlight potential problems created by an ageing workforce, reveals Judy Greevy, Deputy Director, Talent, Engagement and Diversity for the government body: *'The initial data showed there was an issue: we had a large number of employees in the older age range and less in the younger age range.'*

HMRC wanted to take a strategic approach to its ageing workforce, where 35% of its staff were aged 50 or over, explained Greevy: *'What does that mean in terms of retaining people with the right professional skills and expertise? Where was the talent coming from and the pipeline to succeed those people?'* Another key piece of the data was finding out whether the myths and preconceptions associated with different generations of workers were actually true, added Greevy.

To tackle preconceptions around age, HMRC established a working group to look at the demographic data of its workforce and its implications for managing an efficient organisation in the future, said Greevy:

*We then held an age summit in April 2013 where senior leaders focused on the whole age range and what they felt the implications of this were. In the process, we did some myth-busting about what employees felt about certain questions on age. For example, was it true that older people took more time off sick? Our data clearly said this was not true. There were also myths about younger people as well, such as less commitment and taking more time off. Again, our data proved this was incorrect.*

The data also revealed that positive myths about younger people being ready for change were also untrue. HMRC used the age summit as an opportunity to get senior leaders to consider how they think about their conscious and unconscious bias around age, explained Greevy: *'We then disseminated the data that de-bunked myths about age to our workforce via our intranet and staff magazine.'*

Earlier this year, HMRC rolled out unconscious bias training through an online programme to all of its managers, remarked Greevy: *'This helps managers think and recognise where they might be making judgements about age and other diversity strands which are not based on facts.'*

HMRC is currently looking at internal promotions to improve the demographic profile of its employees, said Greevy:

*We're not undertaking large-scale recruitment programmes at the moment as we've reduced in size. However, we work hard to ensure there is no age bias in our internal promotion process. We're also looking at how we make ourselves a more attractive organisation to younger people and continue to have an active graduate programme.*

One of the challenges facing HMRC has been to retain the knowledge of its older workforce. To address this concern, HMRC introduced a partial retirement policy in 2008 prior to the UK Government removing the default retirement age. The partial retirement policy allows employees the chance to gradually move to full-time retirements by moving to part-time hours or opting to take all or some of their civil service pension while still working: *'The whole basis is to support people wanting to wind down to retirement and allow us to keep their knowledge in the organisation and so support knowledge transfer,'* explained Greevy. Partial retirees make up 8.5% of its workforce.

Greevy believes that age diversity brings different viewpoints: *'It makes sense for us to have a bigger mixture of ages as we want to be understanding of the taxpayer and our customer base.'* With the demographic data at its disposal, HMRC is now equipped to look at increasing the number of young employees in its workforce, added Greevy:

*We still have much to do such as looking at the younger generation piece and how we can improve future recruitment for that age group and what we need to do about flexible working practices. We're very good at flexible working but we don't get that image out there.*

## HMRC (continued)

### Supporting an age-diverse workforce: five top tips

- **Monitor workforce age demographics** – will help with recruitment and retention of younger and older employees.
- **Offer flexible working/retirement** – will enable employees to balance home, work and caring responsibilities, while also offering job quality.
- **Train managers** – to enable them to better manage their employees at both ends of the age spectrum.
- **Monitor the health and well-being of employees** – to identify trends, for example absence, and put in place interventions, for example reasonable adjustments to support employees.
- **Put in place succession plans** – to help the organisation and employees to plan for their future.

## McDonald's

McDonald's takes ageing demographics across Europe very seriously, says David Fairhurst, Senior Vice-President, Chief People Officer for the UK and Northern Europe at the food retail conglomerate. *'As we emerge from the recession, there is growing evidence to suggest that a sustained recovery may be jeopardised by a rapid reduction in the size of the workforce; in other words, we're facing a workforce cliff.'* Fairhurst cites a recent report from the European Commission, *Growth Potential of EU Human Resources and Policy Implications for Future Economic Growth*, which revealed that the European Union can sustain annual employment growth at the pre-recessionary rate of 1% *'no longer than 2019, despite its current high levels of unused labour reserves'*. Different member states within the European Union will reach the edge of the workforce cliff at different times, says Fairhurst, *'a fact which begins to explain some of the startlingly different challenges McDonald's faces as an employer of 425,000 people in 38 European markets'*.

One of the ways European employers can delay the impact of this workforce cliff is by increasing the participation of the working-age population, argues Fairhurst: *'We need to look at the one in five of the working-age population who are economically inactive. In particular we need to increase participation in the labour market of young workers, women and older workers.'*

Employers must do more to make sure that young workers are ready to enter the world of work, he says. McDonald's has recently pioneered How to Get Hired workshops in the UK, which bring young people into contact with peers who have found work. The retail organisation also runs a Work Inspiration programme, which brings young people into its restaurants for ten days and gives them an insight into what it's like to work at McDonald's. *'It's also about giving women returning to work flexible and progressive workplace practices,'* remarks Fairhurst. *'In addition, older people need to be valued for the contribution they make to the workforce.'*

McDonald's investment in learning and development has proved attractive to both young and older employees, comments Fairhurst: *'Our investment in training and development is on an upward trend. We have the McDonald's University, where you can study all aspects of leadership. We take education very seriously and 82% of McDonald's employees have undertaken training this year.'* McDonald's also has an online portal called 'ourlounge', originally built to host online learning programmes, which enables employees to study online for national recognised qualifications such as GCSE English or Maths. The site has now evolved to become the primary way in which the organisation communicates and engages with its workforce in terms of business messages, competitions and company news:

*It's part of our DNA to share knowledge and we do this through online employee forums. For example, when an employee is going through a programme, there is an online community of learners associated with that programme so employee-to-employee sharing is huge.*

Flexible and progressive working practices have been instrumental in helping McDonald's attract an age-diverse workforce, comments Fairhurst:

## McDonald's (continued)

*We know that our younger workers value flexibility as much as our older workers. When someone applies for a job at McDonald's they are hired on attitude and, as part of the recruitment process, we ask them what hours they want to work and then schedule those hours according to their individual circumstances. We're not rooted in the traditional 9-5 hours.*

Of the 1.2 million people that it employs worldwide, three-quarters of these are aged under 30: *'People perceive us as a young person's employer, but we have a great age range in the UK where our oldest employee is 88. However, some roles are more attractive to older workers, particularly customer-facing roles.'* In the UK, McDonald's has a strong core of older workers, with around two-fifths of restaurants employing staff aged 60 and over. A few years ago, McDonald's conducted research with Lancaster University Management School which found that levels of customer service were 20% higher in restaurants with staff aged 60 or over. Delving deeper, over two-thirds of McDonald's managers said mature workers empathise with and connect well with customers. In addition, almost half the managers cited older workers' ability to go the extra mile and deliver the best possible customer service. The retail giant has proved that its older workers make a substantial difference to levels of customer services in the chain's branches, added Fairhurst: *'Managers are fully aware of the commercial benefits of employing older workers in our branches and we shared that information with them as part of their development programme.'*

McDonald's conducts the bulk of its recruitment online, comments Fairhurst: *'We've received 1 million applications online, but people also turn up to our branches and have a conversation with a line manager about job vacancies. The primary route for older workers is popping into our branches.'*

An important part of the recruitment and selection process is McDonald's 'On Job Experience' (OJE), which gives McDonald's and the applicant the chance to assess whether the working environment is right for them: *'This takes the best part of the day and gives potential employees the chance to work in different sections.'* The introduction of OJEs has had a significant impact on short-term turnover, says Fairhurst: *'Our short-term turnover has more than halved in the last three years.'*

Creating an employer brand that is attractive to employees of different ages is inextricably linked to developing a customer brand which appeals to multiple generations, remarks Fairhurst: *'Our consumer marketing does have a significant impact on how people perceive us as an organisation in the UK and France. We have run campaigns where McDonald's is seen as a place for people from all walks of life.'*

McDonald's has also addressed concerns about its working environment among older workers, says Fairhurst: *'There were perceived barriers to recruiting older workers such as the rapid pace of the working environment and some older workers were also uncomfortable with wearing baseball caps, so we extended options for our uniform so people could feel comfortable.'*

As the economic recovery continues across Europe, Fairhurst identifies two main challenges for McDonald's which are tied in with age diversity:

*'To push back the edge of the workforce cliff as far as we can by helping as many of the working age population into employment and then to ensure these groups are equipped to deliver the levels of productivity we'll need to maintain our economic health in a way that is sustainable for the long term.'*

### **Supporting an age-diverse workforce: five top tips**

- Assess the impact that different age groups are having on organisational performance and communicate this to the business.
- People have different needs at different life stages. Be mindful of these when developing HR policies and practices.
- Give people the opportunity to experience the workplace as part of the recruitment process.
- Be flexible around working hours and schedules.
- Invest in the training and development of every employee – the returns on that investment are there at every age.

## Santander

For Santander, its main priority is to ensure that it has the best possible talent and offers employees a range of working practices to ensure that its workforce feels valued. In terms of demographic profile, the typical age of its colleagues is 36 years old, with an average tenure of eight years.

Santander monitors recruitment by age but not promotion or grievances, explains Marcus Lee, Head of Resourcing, People and Talent at Santander: *'We monitor recruitment by age ranges so we look at how successful we are in 21-30, 31-40 and 41-50 etc.'* Santander has a range of recruitment methods in place to recruit an age-diverse workforce, such as social media, traditional job boards and networking groups: *'For us, it's about recruiting the widest demographic possible.'*

Its age profile is weighted towards younger workers as only 15% of its employees are aged 50 and over and only 3% of its hires are aged over 50: *'The average age of our recruits is 28 and we hire around 500 people a year below 20,'* comments Lee. One of the challenges that it faces, therefore, as an organisation is to ensure that it hires from the widest talent pool and has a demographic representative of its customer base, acknowledges Lee: *'Almost half of our customer base is aged over 50 and 15% of our colleague base is over 50 and that is not consistent.'* To improve the age diversity of its workforce, Santander is exploring initiatives such as a customer referral scheme in its branches, whereby customers can refer potential candidates. The financial services business already runs a very successful colleague referral programme where its people are recognised for introducing others to the organisation, comments Lee: *'We're also looking at recruiting people looking at a change in career,'* said Lee. *'As an organisation, we have seen in cases the longer the tenure of a colleague, the better the customer seems to value their experience. We're looking to hire people who want to stay with the organisation, but we don't necessarily get a strong enough pipeline of people who are aged 50.'* To attract people considering a change in career, Santander has recruited through the website Mumsnet: *'This is a good example of gearing our recruitment towards somebody who has worked in a different career previously,'* says Lee.

On the opposite end of the age spectrum, Santander has an array of programmes in place to target the 16-24 age bracket, explains Lee: *'There are almost 1 million young people out of work in the UK and it's an excellent pipeline to hire into and we do so with some confidence in that age demographic.'* Santander offers Apprenticeships for its retail business and NVQs in financial services. *'We expect to hire 200 a year,'* says Lee. It also runs a school-leavers' programme for A-level students who can go on to achieve a chartered banking diploma: *'We have internships and a graduate route and offer 300 work experience places a year to give people an opportunity to find out what it's like to work at Santander, which could lead to an Apprenticeship, school-leaver or direct hire route.'*

In terms of supporting line managers to help facilitate age-diverse teams, Santander offers diversity and inclusion training to all its managers, not just age-specific diversity training: *'There is additional inclusivity training for senior leaders, but it's not age-specific.'* Santander is continuing to increase its investment in training and development, says Lee: *'We'd recognise that people who feel included and valued are more engaged and our culture needs to reflect the value of every individual.'*

Santander supports the extension of working life through its flexible working patterns and rewards: *'We have a range of flexible benefits that colleagues are entitled to during their lifetime, such as iPads, bikes, additional medical coverage, flexible holiday and childcare benefit,'* explains Lee:

*Colleagues have choice over their benefits and flexible working practices. If a colleague decides they no longer want to work full-time, they can continue to work on a relief-type basis. That is an option we provide for people to enable us to retain their knowledge and for them to work flexibly. We're currently exploring job-share and challenging managers about where roles can be delivered successfully in this way.*

For Santander, the benefits of an age-diverse team make sound business sense, remarks Lee:

*We have a diverse range of customers and we expect to have a colleague base that reflects that diversity to deliver the best customer experience. There are other benefits to age-diverse teams such as knowledge-sharing and problem-solving. It's about having different perspectives.*

## Santander (continued)

### **Supporting an age-diverse workforce: five top tips**

- Always be open to new talent pools.
- Recognise that at times there will be differences of opinion in the workplace – it's how this is managed which makes a difference.
- Challenge yourself, and allow others to do the same, about whether you or your organisation role-models the values expected.
- Create the environment that truly allows every individual to maximise their potential. People perform better if they feel valued.
- Demonstrate with accountability through measurement the commitment your organisation has to a diverse workforce.

# Part 3

## Conclusions

The purpose of looking at age in the workplace is not about being politically correct nor simply compliant to fulfil legal obligations. Organisations need to engage with what people really feel about working with multi-generational groups. This report therefore provides insight from employees themselves as well as organisations that are pushing the agenda of inclusion forward. This helps us to make balanced recommendations across perspectives on which sound and coherent strategy can be based.

Employees and employers alike agree on the importance of flexible working practices to support age diversity but much more needs to be done in this area to truly achieve it. Employers need to be creative and courageous and rather than following what others do they need to really examine what would work for their business and people and be prepared to tear up the rule book.

Employee life stages are becoming ever more distinct and employers need to tap into these stages if they are to get the best out of their people and deliver to their customers in ways that make business sense. In fact, focusing on life stages rather than generational stereotypes is a more effective, progressive and inclusive approach.

As people increasingly look to change careers on a more frequent basis, savvy organisations will tap into this talent pool and bring in employees with different skills, experiences and career trajectories to the benefit of their organisation.

They will also support their own employees to develop diverse careers.

Employee well-being is an increasingly important issue. Organisations need to help people of all ages manage their current and future well-being and economic independence.

Employees themselves identify the different values between younger and older workers as a potential source of conflict. Conflict can have both negative and positive consequences. Line managers need support and training to enable people to work effectively together, but that does not mean diluting contrasting values; instead, they should use them as a point of competitive advantage to develop better solutions and services. Below we draw out some practical actions to support the above conclusions.

### **Develop commercial awareness**

- Measure the age profile of your workforce. Measure and look at your age profile on a continuous basis to see what is changing and inform your strategies.
- Understand the commercial benefits of age diversity within your own organisation and share it with employees
- Make age diversity part of your brand in a way that differentiates you and appeals to employees and customers alike.

*‘Employee well-being is an increasingly important issue. Organisations need to help people of all ages manage their current and future well-being and economic independence.’*

*‘Employees in particular favoured informal rather than formal practices to help get the most from an age-diverse workforce.’*

#### **Attract age-diverse talent**

- Give people the opportunity to experience the workplace prior to employment as part of the recruitment process, but extend this beyond just young people or junior roles.
- Provide work experience starting from a very early age so that young people are actively engaged with the world of work.
- Make use of customer referral schemes to increase employee age diversity.
- Recognise that people are increasingly making career changes and build this into recruitment and development strategies.

#### **Harness the benefits of age-diverse talent**

- Harness the benefits through informal policies. Employees in particular favoured informal rather than formal practices to help get the most from an age-diverse workforce.
- Introduce mentoring and shared learning across all age groups. These were identified by employees as areas that employers should encourage to promote age diversity, linking back to the emphasis employees place on knowledge-sharing as a key benefit.

#### **Provide flexibility and choice**

- Identify the different life stages that employees are experiencing.
- Provide choice for individuals around benefits and working practices to suit their personal needs.

#### **Extend working life**

- Be innovative and progressive when helping employees to manage their personal health and well-being. Build in increasingly important issues such as mental health, stress and physical health.
- Help people to plan for the present and for the future through practical financial education.
- Extend current flexible working options including job-sharing and phased retirement practices to do more to support the extension of working life.



# References

CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Managing an age-diverse workforce: employer and employee views [online]*. Survey report. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/survey-reports/managing-age-diverse-workforce-views.aspx> [Accessed 4 December 2014].

DEPARTMENT FOR WORK AND PENSIONS. (2014) *A powerful new voice for older workers [online]*. 14 July. Press release. London: DWP. Available at: <https://www.gov.uk/government/news/a-powerful-new-voice-for-older-workers> [Accessed 4 December 2014].

OFFICE FOR NATIONAL STATISTICS. (2014) *NEET: Young people Not in Education, Employment or Training (NEET), November 2014 [online]*. Statistical Bulletin. London: ONS. Available at: [http://www.ons.gov.uk/ons/dcp171778\\_383815.pdf](http://www.ons.gov.uk/ons/dcp171778_383815.pdf) [Accessed 4 December 2014].

# Appendix 1

## Part 1 research sample

LONDON 25-40 age group						
Respondent name	Gender	Age	Sector	Industry	Level of responsibility	Size of organisation
Kerri	Female	37	Private sector	Finance	Junior manager	200-249
Gemma	Female	28	Charity	Health	Middle manager	500+
Kim	Female	29	Private sector	Finance	Team leader	50-99
Charles	Male	32	Public sector	Local government	Middle manager	500+
Shaun	Male	34	Private sector	Construction	Other worker with no responsibility	100-199
Junior Anthony	Male	28	Private sector	Retail	Other worker with no responsibility	250-499
Jack	Male	31	Private sector	Wholesale	Other worker with no responsibility	5-9
Ana	Female	32	Private sector	Hospitality	Other worker with no responsibility	20

## LEEDS 40-65 age group

Respondent name	Gender	Age	Sector	Industry	Level of responsibility	Size of organisation
Nick	Male	52	Private sector	Service industry	Other worker with no responsibility	500+
Noel	Male	58	Private sector	Hospitality	Other worker with no responsibility	200-249
John	Male	53	Public sector	Education	Other worker with no responsibility	20-49
Kully	Female	42	Public sector	Public administration	Middle manager	500+
Mark	Male	55	Public sector	Public administration	Middle manager	200-249
Angie	Female	47	Charity/ voluntary sector	Charity	Other worker with no responsibility	500+
Brenda	Female	55	Private sector	Retail	Other worker with no responsibility	50-99
Debbie	Female	52	Private sector	Retail	Other worker with no responsibility	20-49

# Part 1 focus group discussion guide

## Introduction (5 min)

- Welcome
- Explain purpose of research and technical issues
- Assurances on confidentiality: explain how research will be used and that participation is confidential
- Respondents introduce themselves: first name, occupation, interests – including details on job role and size of organisation.

## Warm-up (10 min)

- Starting off, tell me about what aspects of your work are most important to you? (Write down on whiteboard.)
  - Probe: career progression, flexible working, job satisfaction, earning enough to have a decent standard of living, training and development, teamwork and socialising.
- Have your priorities changed over time? How so?
- Do you expect your priorities to change in the future? Why/why not?

## Awareness and impressions of age diversity in the workplace (20 min)

### OBJECTIVE: Understanding awareness of age diversity and how age-diverse workers feel their organisation is.

- Moderator to place the words 'diversity in the workplace' on a board – What are the first words/thoughts/emotions that

come to mind when seeing this?  
– How relevant is this to you? Why?

- Probe: does it affect you? How?
- What makes a workplace diverse?
- Moderator to take note of any spontaneous mentions of age diversity.
- What do you think are the main issues facing employers thinking about the diversity of their workforce?
  - How top of mind is age diversity compared with gender equality, minorities, and so on?

- Moderator to place the words 'age diversity' on the board. Now thinking about age diversity in the workplace – what are the first words/thoughts/emotions that come to mind when seeing this?

- **EXERCISE:** Moderator to hand out a thought bubble and ask respondents to write down a personal example from their workplace/previous workplace of age diversity in the workplace. Moderator will then ask respondents to read out their examples.

- Do you feel that your organisation is mainly younger/older/a balance?
  - How does this compare with other organisations or sectors you have worked in?
  - How does this make you feel?

- How does the age diversity in your organisation impact on your working environment?
  - Probe: concerns around the lack of older staff? opportunities to grow, and so on?
- Do you feel that there are any particular age groups that are discriminated against in your workplace?
  - If yes – which groups? How are they discriminated against?
  - Can you give any examples of discrimination related to age in your organisation?

## Benefits and challenges of an age-diverse workplace (40 min)

### OBJECTIVE: Understanding the key benefits and challenges of an age-diverse workplace and gaining personal examples of each.

I'd like to hear about what you think the benefits and challenges are of working in an age-diverse environment.

- Do you enjoy working with colleagues of different ages? Why/why not?
  - Probe: what impact does role level have? How do you feel about working for older/younger managers?
- I'd like you to imagine a workplace where everyone is young (respondents can define 'young'). Please describe what this would be like. How would

they approach work? What are their work priorities? What values/attitudes do they hold?

- Probe: are there any sectors/situations in which this would work well? What are they?
- Who would enjoy working in this type of workplace? And who wouldn't? Why?

- Imagine a workplace where everyone is older. What would this be like? How would they approach work? What are their work priorities? What values/attitudes do they hold?
  - Probe: are there any sectors/situations in which this would work well? What are they?
  - Who would enjoy working in this type of workplace? And who wouldn't? Why?

- And now imagine a workplace with a range of ages – how does this compare with the two workplaces you've described?
  - In what sectors/situations would this work well? Why?
  - Is anyone left out/ignored when there's a range of ages working together?

- What are the positives around working with colleagues of different ages?
  - Moderator to make a list of all the benefits on a flipchart of an age-diverse workforce and split them out by benefits to the individual/the organisation and to both.

- And what are the challenges/tensions?
  - Probe for personal examples of each.

**EXERCISE: Group exercise discussion on benefits and challenges.**

Moderator to show cards with benefits and challenges below,

and write down any additional benefits/challenges identified on extra cards. Ask respondents to split into pairs. Each pair should pick a benefit and discuss why this is a key benefit of age diversity.

**Benefits:** knowledge-sharing, having different perspectives, greater innovation, new ideas, improved problem-solving, enhanced customer service delivery.

**Challenges:** misunderstandings, lack of shared interests, potential for conflict, lack of shared values, difficulty in developing trust, difficulty in gaining agreements.

Moderator will then bring the group together again and discuss in more detail.

- Which are the key benefits and why?
- Probe for examples of benefits they have experienced personally.
- Which are the key challenges and why?
- Probe for examples of challenges they have experienced themselves.
- Ask respondents to explain their understanding of the benefits and challenges covered in this section in more detail.
  - For example, if 'different perspectives' is identified as a key benefit – what role does age diversity play here? How can age diversity help with bringing forward new ideas, improving problem-solving, and so on?
  - In what ways can misunderstandings develop through age diversity in the workplace?
  - Which interests or values are shared and which are not shared?

**The role of organisations in promoting age diversity (25 min)**

**OBJECTIVE: Focusing on the role of organisations and management in ensuring that benefits/challenges of age diversity are overcome.**

- Still thinking about the benefits of an age-diverse workforce, what can your organisation do to ensure these benefits are promoted?
- What should organisations do to overcome the challenges that you have talked about, that is, overcoming the challenge of different perspectives/misunderstandings, for example?
  - Should their approach be formal or informal in this instance?
- Do you think your organisation is focused on age diversity in the workplace?
  - Why do you think they are/are not focused on this?
  - In what ways are they focused? Probe for examples of policy and procedures.
  - How does the organisation size affect this?
- What should line managers do to support age-diverse teams?
  - Are they effective/ineffective at promoting working with team members of different ages?
- Are all age groups given the same access to development and progression opportunities in your organisation?
  - Is this actively encouraged? Probe for examples.
- What should organisations do to avoid/overcome age discrimination in the workplace?

## **Extension of working life (20 min)**

**OBJECTIVE: Understanding attitudes towards the extension of working life and how organisations can support this.**

- What are your current retirement expectations?
  - Is retirement something you aim towards (are actively thinking about?) or not a priority for you?
- What do you see as the benefits of working beyond 65? Can you imagine working beyond 65? Why/why not?
  - Probe: financial benefits versus personal well-being/ social factors.
- What are the drawbacks of working beyond 65?
  - What could encourage you to work beyond 65?
- Thinking about your organisation, do you feel that employees in your organisation are actively encouraged to stay working beyond the age of 65 or does it just happen?
  - Probe any steps taken to encourage them.
  - Is there a culture that supports older workers in your workplace?
- Does your organisation have any policies or practices in place to support the extension of working life?
  - For example, flexible working options, flexible retirement policy.



# CIPD

Chartered Institute of Personnel and Development  
151 The Broadway London SW19 1JQ United Kingdom

**T** +44 (0)20 8612 6200 **F** +44 (0)20 8612 6201

**E** [cipd@cipd.co.uk](mailto:cipd@cipd.co.uk) **W** [cipd.co.uk](http://cipd.co.uk)

Incorporated by Royal Charter

Registered as a charity in England and Wales (1079797) and Scotland (SC045154)

Issued: February 2015 Reference: 6867 © CIPD 2015