

THE CITISALES STUDY OF OLDER WORKERS

Employee Engagement, Job Quality, Health, and Well-being

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This is the fifth in a series of Research Highlights published by the Sloan Center on Aging & Work at Boston College. It presents a summary of findings from research conducted with over 6,000 employees from several regions of a U.S.-based retail chain store.

INTRODUCTION

The retail and wholesale trade sector represented about 15% of all U.S. jobs in 2006 and is projected to grow by approximately five percent by 2016.¹ It is therefore important to understand who the workers are for this sector and what constitutes an ideal job for them. This is a paramount need since the industry employs large numbers of hourly workers, about whom there is less knowledge than there is about salaried workers.

As more workers plan to remain employed past conventional retirement ages, it is crucial to understand the needs of older workers in the retail sector and the differences between them and their younger coworkers. There are many stereotypes about older people in general and older workers in particular that make their lives more difficult.² Indeed, people over 65 are not expected to be working at all.³ Specifically, our focus in this issue is to examine differences between older and younger workers, describe the job resources older workers (both hourly and salaried) want and need from their employers, and shed some light on the way that managers/supervisors view these employees.

WHY IS IT IMPORTANT TO FOCUS ON OLDER WORKERS?

Our focus on older workers is important to employers and to older workers themselves. Most employers today recognize the importance of attention to the needs and perhaps unique requirements of older workers, in part because of the perceived need for additions to the available labor pool due to the impending retirement of workers in the Baby Boom Generation. Perhaps more important is the stance taken by a majority of today's older employees who do not plan to retire early as have previous generations, but will instead extend their employment beyond the typical retirement years of 62-65.

Of course, there are both monetary and non-monetary reasons for older workers to consider working longer. The monetary reasons include the need for income above and beyond that derived from pensions, the need to stretch savings due to anticipated extended longevity, and the need for access to more comprehensive insurance/health care coverage.⁴ The non-monetary reasons include the role of work in staying healthy and active, both in terms of mental and physical health and in terms of enjoying long established rewards of work, such as feeling useful, being productive, and helping others.³ Overall, the Bureau of Labor Statistics projects significant growth in the size of the elder labor force in the next decade.¹

Only recently have researchers begun to challenge the notion that older workers are uniformly "disengaging" from work as they approach their later years and suffering from depression and declining health.^{5,6,7} Thus, we know too little about how older workers compare to their younger coworkers in a variety of outcomes, and what constitutes a quality workplace for older employees. In this issue, we will answer the following questions:

- To what extent do older workers differ from their younger co-workers in terms of employee engagement?
- To what extent do older workers experience lower psychological well-being and physical health than their younger coworkers?
- What constitutes job quality for older workers?
- How are older workers viewed by their managers/supervisors?

Data Collection & Methodological Overview

The data were collected at a national retail Fortune 500 company, referred to as *CitiSales* (a pseudonym) that operates over 6,000 stores throughout the United States and has been recognized by the American Association of Retired Persons (AARP) for its commitment to older workers. The *CitiSales Study* is a unique collaboration between private industry and researchers at the University of Kentucky and Boston College.

The Sloan Center on Aging & Work at Boston College funded the research focused on older workers, and the Ford Foundation funded the research focused on hourly workers of all ages. *CitiSales* also provided generous financial and logistical support throughout the project.

Sample Description

Table 1 below presents a summary of the sample for *CitiSales*, both the total sample and the older worker sample.

Research Methods

The *CitiSales Study* includes survey data from employees, and interview data from senior management. Some 6,085 *CitiSales* employees within 388 stores in three regions of the U.S. completed the survey; 72% of the employees who were surveyed responded. The overall sample used for these analyses includes 3,903 workers ages 18-94.

Interviews were conducted with 38 district managers and three regional vice presidents who were responsible for overseeing the operations of stores included in this study. These senior leaders were asked open-ended questions about their work with older workers both hourly and salaried: the extent to which they agreed with some positive and negative stereotypes of older workers and how they felt about working with them in general.

Table 1: Sample Demographics

	All	Under 55	55 +
Older Workers/Younger Workers		88%	12%
Female	74%	74%	73%
Male	26%	26%	27%
White	72%	74%	90%
Black	13%	16%	6%
Other	9%	10%	4%
Less than High School	2%	2%	3%
High School Diploma or equivalent	30%	29%	43%
Some College/2-Year College	40%	45%	26%
Bachelors Degree or Above	23%	24%	28%
Married / Cohabiting	48%	48%	65%
Single/Separated/Divorced	47%	51%	24%
Widowed	2%	1%	11%
Full-Time	63%	63%	67%
Part-Time	37%	37%	33%
Hourly	72%	72%	72%
Salaried	28%	28%	28%

WHO IS AN OLDER WORKER?

The answer, of course, varies across historical periods and industrial sectors.⁸ Thus, researchers use different definitions. Similar to one recent study examining perceptions of older workers, we have chosen to use 55+ as our definition of an older worker.⁹

The majority of employees at *CitiSales* have a high school diploma and some college. Twenty-four percent have a bachelor's degree or higher. These education levels are also reflected in the number of employees in hourly and salaried positions at *CitiSales* as illustrated in Table 1 above. Although the majority of employees are fulltime, only 28% are in salaried positions - the types of jobs that usually require a bachelor's degree or higher.

As seen in Table 2, the workforce at *CitiSales* is split almost evenly between those who have been with the company for up to three years and longer term employees.

Table 2: How long have you been working at *CitiSales*?

	All		Under 55		55 +	
	#	%	#	%	#	%
Less than 6 months	778	12.9	693	14.1	33	4.9
6 months to less than 1 year	706	11.7	637	12.9	38	5.8
1 year to less than 3 years	1447	23.9	1289	26.1	73	10.7
3 years to less than 5 years	898	14.9	753	115.3	72	10.6
5 years to less than 10 years	1236	20.4	947	19.2	203	29.9
More than 10 years	925	15.3	581	11.8	258	37.9

However, examining workplace tenure for the whole sample masks some interesting differences between those employees under the age of 55 and those who are 55 and older.

Sixty-eight percent of older workers at *CitiSales* have been with the organization for over five years. This extended tenure with the organization is even more pronounced among older salaried employees, who report significantly longer tenure do than older hourly employees. Just under a quarter of the older workers (23%) started working at *CitiSales* after retiring from another job, and these employees are more likely to be hourly than salaried workers.

Simply staying with a job, or staying with an organization for a longer period of time than other employees, does not necessarily indicate that an individual is any more satisfied with his or her work or even more loyal than those who leave. Therefore, we tested for other differences between older and younger workers that might tell us the extent to which older employees are engaged with the work and manifesting happiness and well-being as opposed to being "checked out" and marking time until retirement, which is unfortunately, the still-prevalent stereotype for older workers.²

TO WHAT EXTENT ARE OLDER WORKERS “ENGAGED” WITH THEIR WORK?

The issue of employee engagement (EE) has been a matter of increasing importance to today’s business leaders as the positive benefits to organizations and the employees themselves are clarified and heralded.⁵ “Research suggests that workers who are engaged tend to be less stressed, more satisfied with their personal lives, use less health care, take fewer sick days, are more productive, and stay longer with their company than their less engaged counterparts.”¹⁰

Kahn, who popularized the notion of EE in 1990, viewed engagement as the “harnessing of organizational members’ selves to their work roles; in engagement, people employ and express themselves physically, cognitively, and emotionally during role performances.”¹¹ Generally, engaged employees are those who have a “sense of energetic and effective connection with their work activities and they see themselves as able to deal completely with the demands of their job.”¹² In sum, “...fully engaged employees are those who go beyond what their job requires, putting in extra effort to make the company succeed.”¹³

A major impetus for this research was to determine the job resources at *CitiSales* that drive employee engagement for older workers.^{14,15} For the *CitiSales Study*, engagement was assessed by a measure created for the organization and modified over the years for organizational purposes, with employees rating their agreement/disagreement with each item on a 5-point scale. As shown below, the eight items measure the cognitive, emotional, and behavioral aspects of engagement (for a breakdown of the items in each category see endnote 14).

CitiSales Study Measure

- It would take a lot to get me to leave *CitiSales*.
- I would like to be working for *CitiSales* one year from now.
- Compared to other organizations, I think that *CitiSales* is a great place to work.
- I care about the future of *CitiSales*.
- I feel like an important part of the company.
- I feel that my work makes an important contribution to *CitiSales*’ success.
- I am always willing to give extra effort to help the company succeed.
- I would highly recommend *CitiSales* to a friend seeking employment.

Given the negative stereotypes that exist about older workers on the job, especially the one that implies weakening ties, it is interesting to note that older employees at *CitiSales* exhibit significantly higher levels of employee engagement than do their younger co-workers. This finding is one indication that their longer tenure may be due to pleasure in the work rather than lack of options or marking time.

BUT ARE THESE OLDER WORKERS DOING WELL EMOTIONALLY AND PHYSICALLY?

For young and middle-aged adults, the positive connection between work and psychological well-being is well documented. Older workers face different choices and challenges than do younger workers, however, and the psychological benefits of work later in life are less clear.

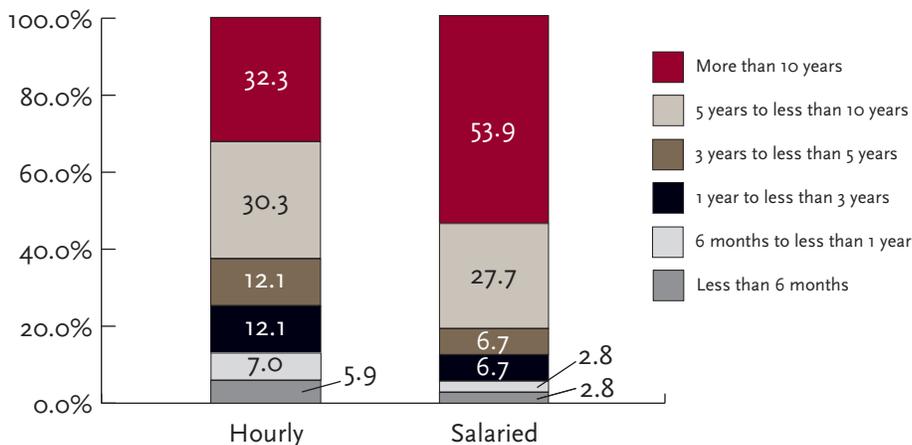
In recent years much research has pointed to more positivity and contentment among older people.¹⁶ In relation to work, several researchers have pointed to higher emotional well-being for older people who continue to work.^{17,18} James and Spiro, for example, found that across 12 years of a national longitudinal study, those older workers who were continuing work, whether part- or full-time, were less depressed than those who had retired.⁴

For purposes of the *CitiSales Study*, psychological well-being was measured by summing up the following two items: (1) During the past four weeks, to what extent have you been bothered by emotional problems (such as anxiety, depression or irritability)?; and (2) All things considered, how do you feel about your life these days?

As with employee engagement, we found again that older *CitiSales* employees exhibit significantly higher levels of psychological well-being than do their younger co-workers. Contrary to the stereotype, these workers were less bothered by emotional problems and more satisfied with their lives than their younger counterparts.

As we know, older workers are not all alike. *CitiSales* employees, in particular, included workers of different backgrounds and status. As mentioned above, the older workers in *CitiSales* manifested longer tenure with the organization. Within the group of older workers, however, we saw that the tenure of salaried employees is significantly longer than that of hourly employees (See Figure 1). Does this mean that only the salaried workers are finding meaning and pleasure in their work?

figure 1. Length of Tenures of Hourly and Salaried Employees at *CitiSales*



Source: ?

To answer this question, we returned to the full sample for a few analyses. Among the total sample of employees, salaried employees reported significantly longer tenures, higher levels of employee engagement, and psychological well being than did hourly employees.

However, in stark contrast to the sample as a whole, older workers exhibited significantly longer tenure, higher employee engagement and psychological well being, despite the fact that the majority of older workers are paid hourly.

Taken together, these findings suggest that older employees' longer tenures with *CitiSales* result from greater engagement and general happiness in their positions than their younger coworkers.

Health and Older Workers

One of the most widely held stereotypes of older workers is that they are in declining health and therefore unsuitable for work.² At the same time, we hear about increased longevity, better healthcare, more health-promoting behaviors, and the potential for a long life with good health.¹⁹ Studies tend to support the latter view. Grafova, McGonagle, and Stafford, for example, find that while there are slight declines in self-reported health among individuals ages 65-79, fully 2/3 of the 79-year-olds report being in good to excellent health.²⁰ Due to the seemingly intractability of the stereotype, we examined differences among older and younger workers at *CitiSales*.

Health was assessed by one question: "Overall how would you rate your health during the past four weeks?" We found that the majority of respondents in the total sample (88%) rated their health as good or better during the previous four weeks. Most importantly, we found no significant differences in self-reported health between older workers (55 and older) and younger workers, (under age 55). That is, older workers view themselves as healthy as the younger workers. Of course, these ratings are subjective in that they are employee perceptions of health and not actual health indicators. On the other hand, subjective health has been shown to be a significant indicator of mortality even when the effects of physical health and chronic illness are taken into account.²¹

WHAT IS JOB QUALITY FOR OLDER WORKERS?

The question of what older workers want is hard to answer. In the first place, they are not a homogeneous group; there are many differences among them. Some want "bridge jobs"²²; some want phased retirement²³; and some want promotions²⁴. In the second place, there is little to go on to develop measures that will capture job resources that are important to older workers in this world of increased longevity, continued health, and extensions to the work years. Thus, we relied on job quality measures developed for younger workers (why should older workers be different?) as described by Karasek and others, and a few additional job resources, such as schedule flexibility and opportunities for development that may be particularly important to older workers.^{25,8,26}

The comprehensive survey completed by *CitiSales* employees contained 29 questions related to on-the-job support and resources that constituted job quality. These were subjected to analyses and then categorized as "factors." The factors that emerged differed somewhat for hourly and salaried employees. Table 3 presents the job qual-

ity constructs and the individual items that went into the scale for hourly workers and salaried workers, as well as the considerable overlap that was manifest.

The most important job factor for older workers is the availability of a supervisor who is a good manager of both the business side and the people side of the equation.¹³ The job factors that emerged for older workers were not unlike those important to younger workers in that both groups want an effective supervisor, a job that fits their skills and abilities, flexible schedules and the ability to change schedules with little notice. However, contrary to the stereotype that older workers are just marking time until retirement, we found that older workers want opportunities for development and fair chances for promotion. Indeed, the more that older workers perceive that development and promotion opportunities are available, the more engaged they are with the organization.⁵

In short, our analyses combine to reveal a portrait of a very dedicated, happy group of older workers at *CitiSales*. They see themselves as “...more reliable than younger workers, more productive, and having great loyalty to the company.”⁵ In some ways, their younger coworkers do not see them in quite the same light as they see themselves. In fact, the negative perceptions of these employees held by their coworkers decreased with age.⁵ Thus, we wondered about the extent to which these older workers were viewed positively by their supervisors and managers.

Table 3: Job Quality Factors Comparison for Older Hourly and Older Salaried Workers

Older Hourly Workers	Supervisor Effectiveness Overlap (mentioned by both groups)	Older Salaried Workers
Supervisor Effectiveness Group Specific Items	Supervisor Effectiveness Overlap (mentioned by both groups)	Supervisor Effectiveness Group Specific Items
I think that cooperation and teamwork are strong within my store.	My supervisor is supportive when I have a work problem.	I have a clear understanding of the career paths available to me within <i>CitiSales</i> .
My store consistently provides excellent service to our customers.	My supervisor really cares about the effects that work demands have on my personal and family life.	I have a clear understanding of the goals and priorities of my store/group.
I am allowed to make the decisions necessary to do my job well.	I feel valued as an employee of <i>CitiSales</i>	I have sufficient access to career development opportunities.
	I am recognized when I do good work.	I receive the necessary level of training to perform my job effectively.
	I am encouraged to come up with new and better ways of doing things.	
	I understand how my performance is evaluated.	

Older Hourly Workers		Older Salaried Workers
Autonomy Group Specific Items	Autonomy Overlap (mentioned by both groups)	Autonomy Group Specific Items
My job is interesting and challenging.	I have the general tools and resources I need to do my job well.	I am allowed to make the decisions necessary to do my job well.
I am generally able to get my work done without facing too much red tape or bureaucracy.	I have a clear understanding of what is expected of me.	
My job makes full use of my skills and abilities.	I am generally able to get my work done without facing too much red tape or bureaucracy.	
I have a clear understanding of the goals and priorities of my store/group.		
Scheduling Satisfaction & Input Group Specific Items	Scheduling Satisfaction & Input Overlap (mentioned by both groups)	Scheduling Satisfaction & Input Group Specific Items
Think about when you generally learn about your work schedule; is it more than enough, enough, or not enough time to plan personal, family, or other responsibilities?	How often are your preferences about the days and times of when you work taken into consideration by the person who writes your schedule?	I am subject to hostility or abuse from customers.
	How much input do you have into the number of hours you work each week?	
	Overall, in the past month how satisfied have you been with the weekly schedule you've been assigned?	
Job Fit Group Specific Items	Job Fit Overlap (mentioned by both groups)	Job Fit Group Specific Items
I have sufficient access to career development opportunities.	My chances of being promoted at <i>CitiSales</i> are good.	Think about when you generally learn about your work schedule; is it more than enough, enough, or not enough time to plan personal, family, or other responsibilities?
I have a clear understanding of the career paths available to me within <i>CitiSales</i> .		My job is interesting and challenging.
I am subject to hostility or abuse from customers.		My job makes full use of my skills and abilities.
I receive the necessary level of training to perform my job effectively.		
I have a clear understanding of the career paths available to me within <i>CitiSales</i> .		

Older Hourly Workers		Older Salaried Workers
Flexibility Group Specific Items	Flexibility Overlap (mentioned by both groups)	Flexibility Group Specific Items
	When an unexpected personal or family matter arises, I have the ability to modify my schedule	
	I have the ability to change my schedule when I have family or personal business to take care of.	
	I have the ability to change my starting and quitting times on a daily basis.	
	How often are the people you work with willing to swap hours with you or cover for you when you need to take time off for a personal or family matter?	
Perceived Fairness Group Specific Items	Perceived Fairness Overlap (mentioned by both groups)	Perceived Fairness Group Specific Items
I have a positive impact on other people's lives through my job.	At <i>CitiSales</i> , employees who ask for time off for family reasons are less likely to get ahead in their jobs or careers.	
	In decisions about promotion, <i>CitiSales</i> gives younger people preference over older people.	
Teamwork Group Specific Items	Teamwork Overlap (mentioned by both groups)	Teamwork Group Specific Items
		My store consistently provides excellent service to our customers.
		I think that cooperation and teamwork are strong within my store.

WHAT DO THE MANAGERS THINK?

In general, the managers we interviewed were very positive about their older employees. Well over 80% of the managers spoke of the value of these workers to the organization. Older workers were described variously as “loyal and reliable,” “mature and experienced,” “ethical and trustworthy,” “motivated and flexible,” and “customer-focused.”

One manager stated: “I would say, generally speaking, our older workers are more reliable from a punctuality standpoint and from an attendance standpoint.” Another manager said that people who were raised during the Depression Era “just have a different respect for the job and the company and what their contributions [ought to be] and how important it is to be loyal and those types of things.” As to customer service, one manager said, “... they’re usually more comfortable speaking to a customer who’s maybe a stranger; or in a lot of cases, the older workers have lived in that town or neighborhood for a large portion of their life, so they know a lot of the customers that are coming in the door.”

DID THEY HAVE TO ADJUST MANAGEMENT PRACTICES?

When asked if they had to adjust management practices to deal with older workers, some managers mentioned accommodations for physical ability. Some managers who saw themselves as much younger than their older workers mentioned the need to adjust communication styles with them. “It takes a little bit more time because you really definitely have to earn that respect because you’re working with someone who... has been working longer than I’ve been alive.” One manager viewed older workers as “resistant to change,” but another felt they should be given “more responsibility.” Some said there were no differences in their approach to these workers compared to any other workers. Some mentioned the need to accommodate their needs for flexibility for health care needs and for doing the things they like to do.

Managers were asked if they made accommodations for older workers in their training protocol. Managers generally felt that there was no need for this as older workers learn as easily as anyone else. Some said they would provide individualized training for anyone of any age who needed it. Most felt that training must be consistent across the board; one manager put it this way: “...if a manager tries to use a different style for a different employee, that’s where he or she will run into trouble...[managers] need to try to be more consistent...” One manager felt that older employees are easier to train, telling us: “...if anything [they are] easier to train on something new...they’re seasoned...and their work ethics, frankly, are just far superior to the younger group.”

In sum, these managers see their older workers much like the older workers see themselves; as good workers, engaged, dedicated, and happy with their employer.

Highlights

The *CitiSales Study* is a large sample of employees who represent a wide range of ages, job status, and geographic spread in an organization that has been recognized by AARP for its commitment to older workers. Fully 12% of the sample is made up of older workers.

The older workers in this group are very similar in demographic make-up to the rest of the organization, and the organization is very similar to others of its type. In many ways, the older workers at *CitiSales* defy stereotypes, such as the one that suggests workers are “just marking time until retirement,” in declining health, or are overly anxious and depressed.

- ▶ Fact: Older workers at *CitiSales* report higher employee engagement than do younger workers.
- ▶ Fact: Older workers at *CitiSales* report higher emotional well-being than do younger workers.
- ▶ Fact: Older workers at *CitiSales* report equally good health as do younger workers.
- ▶ Fact: Older workers at *CitiSales* have longer tenure with the organization; this commitment seems to stem not from a lack of options or from marking time until retirement, but from finding the work meaningful and enjoyable.

Older workers are not a homogeneous group, but do have needs for certain job quality resources, including flexibility, opportunities for development, schedule input (hourly workers only), teamwork, and perceived fairness (salaried workers only).

District supervisors and regional directors in general have very positive views of the older workers at *CitiSales* finding them to be good with customers, reliable, ethical and trustworthy.

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The Sloan Center on Aging & Work at Boston College was founded in 2005 with a multi-million dollar grant from the Alfred P. Sloan Foundation. The Center partners with workplace decision-makers in evidence-based research on employer and employee responses to the increasingly global multi-generational workforce. These collaborations focus on quality of employment with the aim to inform employers with research data to attract, engage and retain high quality industry talent. As of 2008, the Center has three research streams – the US National Initiatives, the State Initiatives and the Global Initiatives. Their collective mission is to gather information and collaborate with leaders in the public, non-profit and business sectors in an effort to leverage today's multi-generational workforce and globalization as competitive advantages in the 21st century economy.

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