



Department  
for Education

# Teachers and ill-health retirement

**Annex F: Analysis for the Teachers  
Working Longer Review**

**Research report**

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Social Science in Government

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This report draws on the findings of previous reports conducted as part of the Teachers Working Longer Review; specifically the Review Interim Report (2017), two rapid evidence assessments by ICF (2017) and by Pollard *et al.* (2017), and qualitative research conducted by Cooper Gibson (2017).

## Glossary

Actuarially Adjusted Benefits (AAB)	Under AAB, teachers are able to start claiming their pension benefits before they reach their Normal Pension Age (NPA) provided they are age 55 or over, were in pensionable teaching employment on or after 30 March 2000 and are out of service. Pension benefits are actuarially adjusted to reflect that the payments start before NPA.
Advisory teacher	A teacher who visits schools to advise teachers on curriculum developments within a particular subject area.
Centrally employed teachers	Centrally employed staff include peripatetic teachers, home tutors and teachers who are employed by education authorities to provide education in institutions other than schools (e.g. hospitals, home tuition, assessment centres and pupil referral units).
Ill-health retirement	Ill-health retirement benefits are payable if teachers become permanently unfit to teach due to illness or injury and are likely to remain unable to teach up to their Normal Pension Age (NPA).
Middle leadership	The middle leadership role comprises teachers who are subject leaders, middle managers, heads of department and curriculum co-ordinators.
Normal Pension Age (NPA)	The Final Salary Normal Pension Age (NPA) for teachers is 60, if they were in service before 1 January 2007, provided they have not transferred the service out of the Teachers' Pension Scheme; or had a break where they were out of service for more than five years ending after 31st December 2007. If teachers entered pensionable service on or after 1 January 2007 or after a break, their final salary NPA is 65.
OH Assist Ltd	Company contracted by DfE to provide medical advisory services to make recommendations in relation to applications for ill-health retirements from members of the Teachers' Pension Scheme (TPS).
OH Assist Ltd data	An administrative dataset containing all ill-health applications considered by medical advisers.

Partial Incapacity Benefits (PIB)	This terminology is used for administrative purposes only to understand when a teacher is awarded an ill-health pension without enhancement. It can be used to refer to the awarding of an ill-health retirement where the applicant is assessed as being unfit to teach, but potentially able to take on other types of work.
Peripatetic teacher	A teacher who is not based in one particular school, but instead works in more than one establishment; usually teachers in a particular field, such as visual impairment.
Phased retirement	Under phased retirement, teachers access their pension benefits from age 55 while continuing to work. Individuals are able to decide how much they wish to take of the benefits they have accrued - up to a maximum of 75% of their total benefits. Members in the final salary arrangement can take up to two stages of phased retirement before the age of 60.
Premature retirement	Premature retirement benefits are arranged between teachers and their employer(s). Employers are responsible for paying a portion of the pension and lump sum. Premature retirement is not an automatic right; it is at the discretion of the employer(s).
State Pension age (SPA)	The State Pension age (SPA) is the earliest age that individuals can start receiving their State Pension. Individuals' State Pension age is worked out based on their gender and date of birth.
School Workforce Census (SWC)	An annual collection published in July each year based on data collected in November of that academic year. This collection includes characteristics about the teachers and about their working week, as well as the schools they work in. The SWC covers state funded schools in England and started in 2010. Further details on the SWC can be found in the SWC User Guide <sup>1</sup>
Senior leadership	Deputy head teachers and assistant head teachers are categorised as being in a 'senior leadership role'.

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[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/569394/School\\_workforce\\_census\\_2016\\_guide\\_v1\\_2.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/569394/School_workforce_census_2016_guide_v1_2.pdf). Accessed on 24 November 2016



Service agreement	A service agreement applies where a teacher is working in a school, but their contract is with another organisation, e.g. an agency or another school.
Teacher Reference Number (TRN)	A unique identifier for each teacher used in national databases.
Teachers' Pension Scheme (TPS)	The Teachers' Pension Scheme (TPS) covers teachers and lecturers in schools, academies, further education colleges and higher education establishments in England and Wales.
Total Incapacity Benefits (TIB)	Type of ill-health retirement awarded when the applicant is assessed as being totally incapacitated for further work and is awarded an ill-health pension with enhancement.
Unique Reference Number (URN)	A unique identifier for each school used in national databases.

# Executive summary

## Introduction

This work addresses information gaps that were identified by the Teachers Working Longer Review, specifically on the impact of ageing on a teacher's ability to work longer as a result of the increase in normal pension age (NPA) in the Teachers' Pensions Scheme (TPS). The work is based on analysis of a merged database, covering the School Workforce Census (SWC), TPS data and OH Assist Ltd data. These datasets have not been merged together before for analysis, and therefore the analysis is very much exploratory in nature.

The analysis covers teachers who were working in state-funded schools in England in the period 2010 to 2014, and examines their working age and retirement activity. Most of the analysis focuses on 56,786 teachers who were eligible for a teacher's pension and who retired from teaching during the same time period (2010-2014). Detailed analysis of ill-health retirement is limited to 1,301 cases that were matched across all three datasets. Analysis of teachers' age uses the full SWC dataset for 2014, covering 491,482 teachers.

## Aims and Objectives

This work was commissioned to provide evidence on the impact of ageing on a teacher's ability to work longer, and to address a number of key questions, which are summarised below:

- What are the characteristics (personal and school level) of those teachers who retire early through ill-health compared with those who retire early for other reasons?
- What is the relationship between retirement age, different teaching roles and ill-health?
- Which medical conditions result in ill-health retirement, and how do these vary by teacher characteristics?

## Key Findings

### Teachers and working age

Among the full population of teachers working in 2014 (491,482 teachers), a small minority (2.2%) were aged over 60, with less than 1% 65 or over. The average age for all teachers was 39.

Teachers were slightly more likely to be working over the age of 60 if they were in the following groups (figures show the percentage in each group that were aged over 60):

- Male rather than female (2.6% compared with 2.0%); this reflects broader patterns for the working population;
- Working part-time (5.7% compared with 1.2% of those working full-time); this may reflect that some teachers reduce their hours as a step towards retirement;
- In a special school (4.8%);
- Working as a centrally employed teacher (8.8%);
- On a non-permanent contract: 4.6% of those on a temporary contract, 4.3% of those on a service agreement contract, and 3.5% of those on a fixed term contract;
- Working as a head teacher (4.5%); and,
- Working in specific roles such as a peripatetic teacher (12.5%), advisory teacher (9.4%), music teacher (9.8%) or teacher in a pupil referral unit (8.4%).

In some cases, these differences reflect more general variations by age. For example, head teachers had an older age profile generally (their average age was 49), as well as being more likely to work beyond the age of 60.

The average age at which teachers retired was generally consistent across various school and teacher characteristics. For example, when analysing by leadership role, the average retirement age was very similar for head teachers (59.0 years), those in senior and middle leadership posts (58.6 years) and classroom teachers (59.1 years). The average retirement age overall was 59.0 years.

## Overview of types of retirement

The analysis examined the different types of retirement taken by teachers between 2010 and 2014. A small proportion of teacher retirements were due to ill-health (3.4%). The most common types of retirement were actuarially adjusted benefits (AAB) (44.8%) and age retirement (47.6%).

The average age for ill-health retirement was 52.6 years. In fact, around one in four teachers who took ill-health retirement stopped teaching before the age of 50.

## Which teachers retire early due to ill-health?

Overall, 3.4% of teachers who retired between 2010 and 2014 took ill-health retirement (1,952 out of 56,786 teachers). The profile of teachers who retired early due to ill-health was generally very similar to that of teachers who took other forms of retirement. The following groups of teachers were slightly more likely to take ill-health retirement (figures show the percentage in each group that took ill-health retirement):

- Special school teachers (4.5%), ahead of primary and secondary school teachers (both 3.4%); the lowest proportion was among centrally employed teachers (2.8%);
- Middle leaders and classroom teachers (3.7% in each case), ahead of senior leaders (2.8%); head teachers were less likely than other teachers to retire due to ill-health (2.0%);
- Those in the teachers main pay range (5.0%), ahead of those in the teachers upper pay range (3.5%) and those in the leadership group pay range (2.3%)<sup>2</sup>; Teachers working full-time compared with those working part-time (3.7% compared with 3.0%).

The SWC includes information on the main subject taught, although this is available for secondary school teachers only. Overall, the figures were very consistent across the different subjects, although secondary school teachers were slightly less likely to take ill-health retirement if they were teaching the following subjects: Drama (1.3%), Religious education (1.7%), modern foreign languages (MFL) (1.8%) and History (1.8%). The one subject where there was a relatively high proportion of ill-health retirements was Information and Communications Technology (ICT) (3.7%).

Secondary school teachers in some subjects were more likely than average to take *some form* of early retirement (ill-health or other type of early retirement): Physical Education (PE)/Sports (67.9%), Music (63.5%) and Geography (60.8%). Overall, 55.4% of secondary school teachers took some form of early retirement.

Additional analysis by individual teaching role should be viewed with caution, as there is some variation in the way that individual roles are described in the SWC. Variations were small, although teachers in some specific roles were more likely to take ill-health retirement: heads of department and heads of year (both 4.1%); there were lower levels of ill-health retirement among peripatetic teachers (2.3%).

The proportions of teachers taking ill-health retirement also varied slightly according to school and pupil characteristics. Teachers were slightly more likely to take ill-health retirement in schools with:

- Higher levels of pupil absence (3.8% in schools where 5% or more sessions were missed, compared with 3.1% in schools where less than 4% of sessions were missed); and,
- Higher proportions of pupils eligible for free schools meals (FSM; 4.2% in schools where more than 20% of pupils were eligible, falling to 2.9% in schools where less than 10% of pupils were eligible).

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<sup>2</sup> See Section 4.2 for details of the pay ranges.

## Reasons for ill-health retirement

A range of different medical conditions resulted in ill-health retirement. Teachers were most likely to be affected by cancer (23%), mental health conditions (20%) and diseases of the nervous system (19%). A slightly smaller proportion (15%) were affected by musculoskeletal conditions.

The reasons for ill-health retirement varied slightly according to teachers' characteristics:

- The reasons were similar between primary and secondary school teachers. However, special school teachers<sup>3</sup> were more likely than other teachers to retire early because of mental health (33%) and musculoskeletal (22%) conditions.
- Female teachers were more likely than male teachers to retire early because of cancer and musculoskeletal conditions, while male teachers were more likely to retire because of mental health conditions and diseases of the nervous system. The gender difference is at odds with the general picture in the population as a whole, where mental health conditions are more likely to be identified among women than men.
- Teachers working full-time were more likely to retire early due to mental health conditions (23% compared with 15% of part-time teachers), while those working part-time were more likely to retire because of diseases of the nervous system (25% compared with 17%).

## Analysis notes

It is important to note the following points when interpreting the findings:

- The analysis is restricted to a specific period of time: teachers who retired between 2010 and 2014.
- The SWC covers teachers in state-funded schools (excluding sixth form colleges) in England. Data on retirement and pensions from other sources may cover a different population (e.g. teachers in non-school settings such as higher and further education, and/or covering all of the UK rather than just England).
- This analysis is based on factual data relating to school and teacher characteristics. Therefore, it will inevitably only be able to show part of the (often complex) picture underpinning retirement plans and activities.
- The main focus of the analysis is on teachers who have taken ill-health retirement, which affects a small numbers of teachers, and has specific eligibility conditions attached to it. This means that teachers who have taken ill-health retirement are a

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<sup>3</sup> Caution: small number of cases (114)

small, specific group who do not represent the broader population of teachers who have health conditions affecting their working life and/or retirement plans.

- As with any analysis, the findings are limited to the information included in the data sources – in terms of their scope and level of detail. This means that the analysis is able to address some of the project aims more thoroughly than others. In particular, the SWC contains limited information on specific teaching roles.
- This analysis identifies relationships between ill-health retirement and teachers' characteristics. However, the analysis is not able to prove any causality; i.e. that any particular characteristic is causing teachers to retire early due to ill-health.
- It is important to note that the analysis is based on a census of teachers during the time period 2010-2014. As the findings are based on a census rather than a sample of teachers, rules of 'statistical confidence' do not apply to the analysis; all differences between sub-groups are valid (however small), and the report commentary describes the findings on this basis.
- Note that in some tables, percentages may not sum to 100, because of percentage rounding.

# 1. Introduction

## 1.1 Background

Following discussions between the Department for Education and teacher trade unions on policy implementation, which commenced in March 2014, the Secretary of State for Education commissioned a review into the health and deployment implications of teachers working longer as a result of the increase in normal pension age (NPA) in the Teachers' Pension Scheme (TPS). The review commenced in October 2014 and is a tripartite review, involving teacher trade unions, employers and the Department for Education. The review is overseen by a steering group made up of employers, unions and DfE officials.

## 1.2 Aims and Objectives

Following the completion of the Teachers' Working Longer Review's Interim Report, and the associated Rapid Evidence Assessments, which were produced to support the Review, there remained a lack of evidence on the impact of ageing on a teacher's ability to work longer. As a result, this work was commissioned to fill this gap and to answer the following questions:

- Which teachers retire early? What are the characteristics (personal and school level) of those teachers who retire early through ill-health compared with those who retire early for other reasons?
- Which teachers are most likely to retire early on ill-health grounds? What are their characteristics (personal and school level)? At what age are they likely to retire? How do they differ from the wider teaching population? How do they differ from those who stay on until or beyond Normal Pension Age? What can administrative data tell us about the relationship between retirement age, different teaching roles (e.g. specific teaching roles of interest include, but are not restricted to, early years/primary school teachers, PE teachers and leadership roles) and ill-health?
- Is there any correlation between the conditions which result in teachers retiring on ill-health grounds or the age at which they do so and the role undertaken? Has this changed over time?
- Are teachers who undertake teaching roles which are considered to be more physically demanding (e.g. early years/primary school teachers, PE teachers, but also could include other teachers with a physical element) significantly more likely to retire early through ill-health compared with other teachers? What is their age profile? How does this differ from the wider teaching population/teachers in other roles?

- What can the data tell us about teachers who retire as a result of mental health issues? Which teachers are most likely to retire early on the grounds of mental ill-health? What are their characteristics (personal and school level)? At what age are they likely to retire? How do they differ from those who retire due to physical health problems? How do they differ from the wider teaching population, if at all?
- What are the characteristics (i.e. but not limited to a range of school and leadership factors: history of Ofsted grades, leadership turnover, % budget spent on supply, pupil characteristics) of the schools from which teachers retire on ill-health grounds? How do they differ from the general school population (if at all)?

## 1.3 Method

### Analysis database

The analysis is based on a merged database, containing data from different sources, as described below. These datasets have not been merged together before for analysis, and therefore the analysis is very much exploratory in nature.

#### 1. The School Workforce Census

The School Workforce Census (SWC) is an annual collection published in June/July each year based on data collected in the November of that academic year. This collection includes characteristics about the teachers and their working week, as well as the schools they work in. The SWC started in 2010.

The Teachers Working Longer Review as a whole covers all teachers who are eligible to be members of the TPS and who are employed in state-funded and independent schools, and sixth form colleges in England and Wales: members of the TPS working in Further or Higher Education are out of scope. However, the SWC only covers teachers in England in state funded schools, i.e. excluding sixth form colleges: the analysis in this report is, therefore, restricted to these teachers.

The analysis is based on SWC data from 2010-2014<sup>4</sup> (inclusive), covering 661,714 teachers<sup>5</sup>.

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<sup>4</sup> The 2014 SWC data was that latest that was available at the time of the analysis.

<sup>5</sup> Specifically, the analysis covers teachers who were included in the annual SWC snapshot in the years 2010-2014 inclusive, based on teachers working in November of the relevant academic year. School and teacher characteristics are the most recent that are available in this timeframe (e.g. if a teacher appears in every year of the SWC from 2010-2014, data from 2014 is used to describe this teacher).



## 2. Teachers' Pensions Scheme data

Information on teachers' pensions is taken from administrative data that is collected as part of the Teachers' Pension Scheme (TPS). Data is recorded each financial year.

The original database covered retirements from 1962-2016, and included information about 913,047 teachers. Cases were matched with the SWC (using the teacher reference number, or TRN), and were included only where the retirement date (variable: 'LastDayofPensionableService') was between 2010 and 2014. This was so that the TPS data should have a timeframe that is consistent with the SWC data. This gives a total of 56,786 eligible cases matched in both the SWC and TPS data. Of these, 1,952 cases took ill-health retirement.

The group of 56,786 matched cases can be defined as: teachers working between 2010 and 2014 in state-funded schools in England who were eligible for a teachers' pension, and who retired from teaching (stopped working) during the same time period.

It is not possible to assess the completeness of the matching process across the two data sources, because the two databases cover different populations. However, according to published SWC tables<sup>6</sup>, the number of retired teachers recorded between 2011 and 2015 was 69,720, slightly higher than the figure in this analysis (56,786). This suggests that most (if not all) retired teachers were identified in the matching process<sup>7</sup>.

## 3. OH Assist data

The company OH Assist Ltd is contracted by DfE to provide medical advisory services and to make recommendations in relation to applications for ill-health retirements from members of the TPS. OH Assist Ltd maintains an administrative dataset containing all ill-health applications considered by medical advisers. The dataset used for this analysis was accessed in October 2016, and covered applications from 8,249 teachers between 2006 and 2013.

For the analysis, cases were included only where there was a match with an eligible SWC and TPS record (i.e. with an actual retirement date between 2010 and 2014), again using the unique TRN. This ensured that the timeframe was consistent with the other data sources and that the application led to an actual retirement. This resulted in a total of 1,301 matched cases (out of a possible 1,952 teachers who took ill-health retirement in the TPS data). The fact that only 1,301 of the 1,952 teachers were matched is partly because the OH Assist data only covered applications up to 2013 (rather than 2014 in

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<sup>6</sup> <https://www.gov.uk/government/statistics/school-workforce-in-england-november-2015>

<sup>7</sup> The precise method for identifying and defining retired teachers was also different. In this project, retired teachers were those active at some point between 2010 and 2014 inclusive (according to SWC) who were recorded (in TPS) as having a last day of recorded service also between 2010 and 2014. The published SWC analysis identifies retired teachers as those who were active in a given year (between 2010 and 2014), but not active and receiving a pension in the following year.

the SWC and TPS data). The databases also cover slightly different teacher populations (e.g. the OH Assist data covers independent schools, but these are excluded from the SWC).

#### **4. Data on school characteristics from gov.uk**

Data on school characteristics is publicly available from gov.uk. Relevant data on school and pupil characteristics was added to the main database, using the school reference number (URN) for matching. The main database covers the period 2010-2014, but data on school characteristics is available only on an annual basis, covering data for each year. Therefore, it was decided to take school-level data from 2014, as this would provide the most up-to-date comparable data. The number of records matched to the main database varied according to the individual variable.

### **1.4 Analysis**

The analysis used the merged database described above. Because the data contained personal and sensitive data about teachers, it was anonymised before data analysis took place. This involved the removal of unique reference numbers and identifiers, as well as teachers' names. In addition, all data was held in a restricted-access file location for the duration of the project.

Most of the analysis in the report is based on matched records containing SWC and TPS data (56,786 teachers). This allows examination of school and teacher characteristics relating to pensions and retirement. Note that, throughout the report, 'retirement' is taken to mean the last day of a teacher's service, rather than when s/he started claiming a pension. In the case of phased retirements, for example, teachers can start claiming their pensions some time before they stop teaching.

In addition:

- Some analysis uses the 1,301 cases which have also been matched with OH Assist data. This analysis focuses on reasons for ill-health retirement.
- Some analysis uses the full SWC dataset for 2014, covering 491,482 teachers who had a valid TRN. This analysis focuses on teachers' characteristics related to age (i.e. over and above any retirement activity). Only SWC data from 2014 has been used for this analysis, so that the age of teachers can be assessed at a single point in time.

A core part of the analysis compares teachers who have retired early due to ill-health, with other groups of retired teachers. This analysis uses the 'Reason for Retirement' variable from the TPS data. For analysis purposes, individual retirement categories have been grouped together, using the 'analysis groups' shown in Table 1. For an explanation of the different types of retirement, please refer to the glossary.

**Table 1 Retirement categories and grouping**

<b>'Reason for retirement': Individual categories</b>	<b>Combined categories</b>	<b>Analysis group</b>
Infirmity – Partial Incapacity Benefits (PIB)	Ill-health	Ill-health
Infirmity - Total Incapacity Benefits (TIB)		
Age	Age	Age
Phased age		
Actuarially Adjusted Benefits (AAB)	AAB	Other early (not ill-health)
Phased AAB		
Premature	Premature/ redundancy/ efficiency	
Redundancy		
Efficiency		

Source: TPS database

It is important to note that the analysis is based on a census of teachers during the time period 2010-2014. As the findings are based on a census rather than a sample of teachers, rules of 'statistical confidence' do not apply to the analysis; all differences between sub-groups are valid (however small), and the report commentary describes the findings on this basis.

## **1.5 Notes on the Analysis**

This is a targeted, exploratory analysis project which aims to address specific questions raised by the Teachers Working Longer Review. It is important to bear in mind the parameters and limitations of the project.

The analysis is restricted to a specific period of time: teachers who retired between 2010 and 2014. As noted in this report, the proportions of teachers taking different forms of retirement, including ill-health retirement, have varied over time. Findings, therefore, need to be viewed in the context of the time period covered by the analysis.

Related to this, the data analysis is based on teachers in the SWC, i.e. teachers in state-funded schools (excluding sixth form colleges) in England. Data on retirement and pensions from other sources may cover a different population (e.g. teachers in non-school settings such as higher and further education, and/or covering all of the UK rather than just England).

The Teachers Working Longer Review Interim Report notes that retirement is affected by a range of circumstances, motivations and attitudes. This analysis informs this issue, by providing analysis based on factual data relating to school and teacher characteristics. However, this analysis will inevitably only be able to show part of the (often complex) whole picture underpinning retirement plans and activities. Related to this, it is important to note that teachers themselves cite health as one of the most likely reasons why they may leave the profession early (Hutchings *et al.*, 2008, referenced in Pollard *et al.*, 2017). In this project, the main focus is on teachers who have already taken ill-health retirement. However, ill-health retirement affects a small numbers of teachers (3.4% of all retirements in this analysis), and has specific eligibility conditions attached to it which have changed over time. **This means that teachers who have taken ill-health retirement are a small, specific group who do not represent the broader population of teachers who have health conditions affecting their working life and/or retirement plans.**

The data sources used for this analysis provide detailed and comprehensive information on teachers' characteristics and retirement activities. However, as with any analysis, the findings are limited to the information included in the data sources – in terms of their scope and level of detail. This means that the analysis is able to address some of the project aims more thoroughly than others. In particular, the SWC contains limited information on specific teaching roles; this is discussed further in the relevant sections of the report.

It is also important to bear in mind the national profile of teachers when looking at the analysis of teacher characteristics. For example, the majority of teachers are female and most teachers work full-time.

Finally, it is important to note that this analysis identifies relationships between ill-health retirement and teachers' characteristics. However, the analysis is not able to prove any causality; i.e. that any particular characteristic is causing teachers to retire early due to ill-health. Rather, the purpose is to identify patterns, which help to show whether certain groups of teachers are more or less likely to go into ill-health retirement.

In particular, care should be taken in interpreting findings based on teachers working full-time or part-time. The analysis indicates that teachers working part-time tend to work longer, and are less likely to retire early due to ill-health. However, while the analysis is able to capture teachers' status at the time of their retirement, it is not able to explore the extent to which teachers reduced their hours close to retirement age, or alternatively had worked part-time for longer periods of their working life. As a result, it is not possible to conclude whether the number of hours worked has contributed to ill-health retirement.

## 2. Teachers and working age

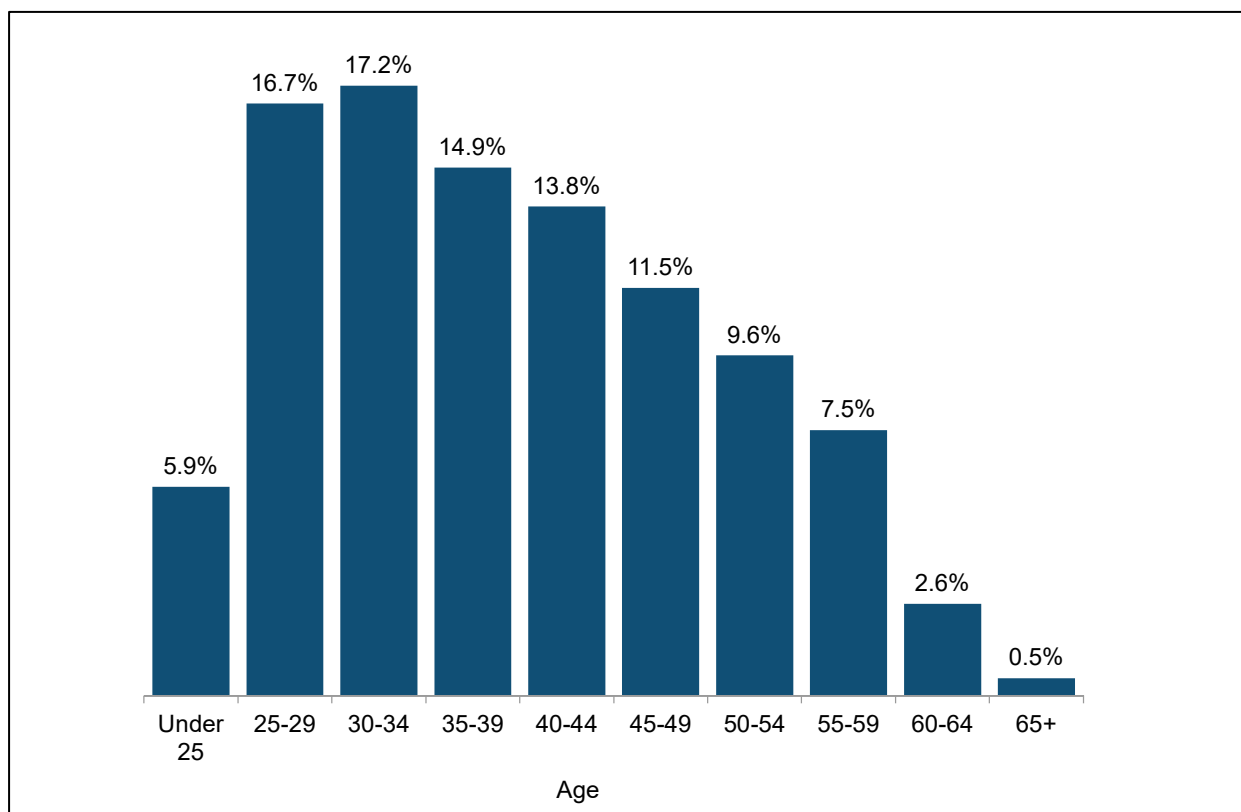
Most of the analysis in this report focuses on teachers who have retired due to ill-health. As noted in the Introduction, this is a small, specific group of teachers (covering only 3.4% of all teacher retirements). As well as those teachers who have retired because of ill-health, other teachers may have had health problems, but did not qualify for ill-health retirement. Therefore, a narrow analysis of the ill-health retirement group may provide only a partial answer as to how health problems affect teachers' retirement.

First of all, therefore, it is useful to look more broadly at the age profile of teachers and the age at which they retire (for whatever reason). This helps to give an overview of how long teachers continue working, and how this varies by teachers' characteristics. This analysis covers all teachers included in the 2014 SWC who had a valid TRN. The analysis is restricted to one year (2014) only, so that the age of teachers can be examined at a single point in time.

### 2.1 Age profile of teachers

Figure 1 shows the age range of all teachers covered by the School Workforce Census (SWC) in 2014. A small minority of teachers (3.1%) were aged 60 or over, and less than 1% were 65 or over. The average age for all teachers was 39.

**Figure 1 Age profile of teachers in 2014**



Base: All teachers in England with a valid TRN, 2014 (491,482); Source: SWC

Further analysis indicates that almost all of those working at the age of 60 or over had a Normal Pension Age (NPA) of 60; just 2% of these teachers had a NPA of 65<sup>8</sup>.

## 2.2 Differences in age profile

The next section looks more closely at teachers' age, examining differences in relation to the characteristics of teachers and their schools.

Overall, 2.2% of teachers were working beyond the age of 60. Analysis by school setting (Table 2) shows that, in 2014, primary and secondary school teachers were equally likely to work beyond the age of 60 (1.9% and 2.0% respectively). However, teachers in special schools were more likely to work beyond the age of 60 (4.8%), and centrally employed teachers<sup>9</sup> were even more likely to do so (8.8%). These differences reflect the overall age profiles: the average age of primary and secondary school teachers (39 years) was

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<sup>8</sup> The Final Salary Normal Pension Age (NPA) for teachers is 60, if they were in service before 1 January 2007, provided they have not transferred the service out of the Teachers' Pension Scheme; or had a break where they were out of service for more than five years ending after 31st December 2007. If teachers entered pensionable service on or after 1 January 2007 or after a break, their final salary NPA is 65.

<sup>9</sup> Centrally employed staff include peripatetic teachers, home tutors and teachers who are employed by education authorities to provide education in institutions other than schools (e.g. hospitals, home tuition, assessment centres and pupil referral units).

lower than the average age of special school teachers (44 years) and centrally employed teachers (49 years).

**Table 2 Age profile by school setting**

	Setting			
	Primary	Secondary	Special	Centrally employed
(Base)	(237,974)	(223,595)	(22,288)	(6,153)
<b>Average age</b>	<b>39</b>	<b>39</b>	<b>44</b>	<b>49</b>
<b>% aged over 60</b>	<b>1.9</b>	<b>2.0</b>	<b>4.8</b>	<b>8.8</b>
% aged 61-65	1.5	1.6	3.7	6.6
% aged over 65	0.4	0.5	1.0	2.2

Base: All teachers in England with a valid TRN, 2014 (491,482); Source: SWC.

Note: Table includes selected categories only; table excludes nursery school teachers (1,472 cases).

Men were slightly more likely than women to work beyond the age of 60 (2.6% compared with 2.0%); see Table 3. This gender difference reflects the pattern for the working population as a whole; analysis of the Labour Force Survey by ONS in 2013 (i.e. broadly equivalent to the time period covered in this project) showed that the gap in the employment rate between men and women in the UK increased as people passed the age of 60. This was attributed to women passing their state pension age and retiring, while men had to wait until 65 for the state pension age (ONS, 2013).

**Table 3 Age profile by gender**

	Teacher's gender	
	Female	Male
	(370,139)	(121,069)
<b>Average age</b>	<b>39</b>	<b>40</b>
<b>% aged over 60</b>	<b>2.0</b>	<b>2.6</b>
% aged 61-65	1.6	1.9
% aged over 65	0.4	0.7

Base: All teachers in England with a valid TRN, 2014 (491,482); Source: SWC.

Note: Table excludes cases where gender is not specified in the SWC (274 cases).

Teachers working part-time had an older age profile than those who worked full-time; the average ages were 43 and 38 respectively. Part-time teachers were also more likely to be over 60 years of age (5.7% compared with 1.2%); see Table 4.

As noted in the Introduction, the analysis is not able to track patterns of part-time working. This analysis captures a teacher’s status at the time of their appearance in the SWC data, but cannot examine whether part-time teachers had recently reduced their hours close to their NPA, or whether they had a longer history of part-time work. Previous research has noted that there is a tendency for teachers to transition into part-time work as they approach retirement (DfES, 2007, referenced in Pollard *et al.*, 2017). However, in this analysis, it is difficult to draw any general conclusions as to the impact of part-time work on extending working life.

**Table 4 Age profile by teachers’ working hours**

	Hours <sup>10</sup>	
	Full-time	Part-time
	(382,727)	(107,513)
<b>Average age</b>	<b>38</b>	<b>43</b>
<b>% aged over 60</b>	<b>1.2</b>	<b>5.7</b>
- % aged 61-65	1.0	4.2
- % aged over 65	0.2	1.6

Base: All teachers in England with a valid TRN, 2014 (491,482); Source: SWC. Note: Table excludes cases where full-time/part-time status is not specified in the SWC (1,242 cases).

Table 5 looks at teachers’ age profile according to the type of contract they have. If a staff member has a contract with a school, it may be either a permanent, fixed term or temporary contract. Fixed term contracts are for an agreed length of time and with a fixed end date; temporary contracts are non-permanent contracts, e.g. when a teacher is acting as cover, without a fixed end date. A service agreement applies where a teacher is working in a school, but their contract is with another organisation, e.g. an agency or a different school.

Most teachers (89%) had a permanent contract of employment. However, those with other types of contract were more likely to be over the age of 60; specifically, this applied to 4.6% of those on a temporary contract, 4.3% of those with a service agreement and 3.5% of those on a fixed term contract.

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<sup>10</sup> The analysis of full-time and part-time hours is based on the classification included in the SWC, in which full-time and part-time school staff are defined by the proportion of the full-time hours upon which they are employed.



**Table 5 Age profile by teacher's contract**

	Teacher's contract			
	Permanent	Fixed term	Temporary	Service agreement
(Base)	(437,263)	(29,292)	(20,660)	(2,590)
<b>Average age</b>	<b>39</b>	<b>37</b>	<b>38</b>	<b>41</b>
<b>% aged over 60</b>	<b>1.9</b>	<b>3.5</b>	<b>4.6</b>	<b>4.3</b>
- % aged 61-65	1.5	2.6	3.1	3.1
- % aged over 65	0.4	0.9	1.5	1.2

Base: All teachers in England with a valid TRN, 2014 (491,482); Source: SWC.

Note: Table excludes cases where contract type is not specified in the SWC (1,677 cases).

Analysis by leadership role (Table 6) shows that head teachers were most likely to be working over the age of 60 (4.5%); this reflects the older age profile of head teachers (average age of 49). Senior leaders and middle leaders<sup>11</sup> were less likely to be aged over 60 (1.7% and 1.5% respectively), although the proportion was slightly higher among classroom teachers (2.4%), and this includes a relatively high proportion who were aged 65 or over (0.6%).

**Table 6 Age profile by leadership role**

	Teacher's leadership role			
	Head teacher	Senior leader	Middle leader	Classroom teacher
(Base)	(21,405)	(44,772)	(122,902)	(301,161)
<b>Average age</b>	<b>49</b>	<b>43</b>	<b>40</b>	<b>38</b>
<b>% aged over 60</b>	<b>4.5</b>	<b>1.7</b>	<b>1.5</b>	<b>2.4</b>
- % aged 61-65	3.8	1.5	1.2	1.8
- % aged over 65	0.7	0.2	0.2	0.6

Base: All teachers in England with a valid TRN, 2014 (491,482); Source: SWC. Note: Table excludes cases where leadership status is not specified in the SWC (1,242 cases).

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<sup>11</sup> Senior leaders are deputy heads and assistant heads. The middle leadership role comprises teachers who are subject leaders, middle managers, heads of department and curriculum co-ordinators.

The SWC includes information on the subjects taught by teachers, although this is only provided for secondary school teachers. Table 7 shows analysis of teachers' age according to the main subject taught<sup>12</sup>.

Overall, the figures were generally consistent across the different subjects, although secondary school teachers were less likely to be teaching certain subjects over the age of 60: Physical Education (PE)/Sports (0.6%), Drama (1.1%), Music (1.1%), Geography (1.3%) and Information and Communications Technology (ICT) (1.3%).

**Table 7 Age profile by main subject taught: secondary school teachers**

	Main subject taught				
	Art and Design	Science	Business Studies	Citizenship or PSHE	Design and Technology
(Base)	(7,138)	(25,178)	(4,599)	(2,962)	(10,611)
<b>Average age</b>	<b>40</b>	<b>39</b>	<b>40</b>	<b>42</b>	<b>42</b>
<b>% aged over 60</b>	<b>1.9</b>	<b>1.4</b>	<b>1.7</b>	<b>2.4</b>	<b>2.3</b>
- % aged 61-65	1.6	1.1	1.3	1.8	1.9
- % aged over 65	0.3	0.3	0.4	0.6	0.4
	Drama	English	Modern Foreign Language	Geography	History
(Base)	(4,117)	(23,994)	(12,413)	(7,711)	(8,675)
<b>Average age</b>	<b>37</b>	<b>38</b>	<b>40</b>	<b>38</b>	<b>38</b>
<b>% aged over 60</b>	<b>1.1</b>	<b>1.6</b>	<b>1.6</b>	<b>1.3</b>	<b>1.5</b>
- % aged 61-65	0.9	1.3	1.4	1.2	1.3
- % aged over 65	0.2	0.3	0.2	0.2	0.2
	ICT	Mathematics	Media Studies	Music	PE/ Sports
(Base)	(6,704)	(22,381)	(1,327)	(4,533)	(15,547)
<b>Average age</b>	<b>40</b>	<b>39</b>	<b>38</b>	<b>37</b>	<b>35</b>
<b>% aged over 60</b>	<b>1.3</b>	<b>2.1</b>	<b>1.6</b>	<b>1.1</b>	<b>0.6</b>
- % aged 61-65	1.1	1.6	1.1	0.9	0.5
- % aged over 65	0.2	0.5	0.5	0.2	0.1

<sup>12</sup> The 'main subject taught' is defined in the SWC as the subject that the teacher was timetabled to spend the most hours teaching or supporting.

	Main subject taught				
	Psych-ology	Religious Education	Other Humanities	Other Social Studies	Other
(Base)	(1,818)	(5,920)	(1,164)	(1,673)	(4,438)
<b>Average age</b>	<b>38</b>	<b>39</b>	<b>39</b>	<b>40</b>	<b>43</b>
<b>% aged over 60</b>	<b>2.0</b>	<b>1.8</b>	<b>3.4</b>	<b>3.6</b>	<b>3.4</b>
- % aged 61-65	1.6	1.4	2.3	2.8	2.7
- % aged over 65	0.4	0.4	1.0	0.8	0.7

Base: All secondary school teachers in England with a valid TRN and with information available on subject taught, 2014 (172,903); Source: SWC

As noted above, information on the subject taught is only available for secondary school teachers. A wider analysis of teachers' area of specialisation is based on the field in the SWC that describes each teacher's role. However, it should be noted that there is some variation in the way that individual roles are described; for example, most teachers (386,389 out of 491,482) are described simply as a 'classroom teacher', while for others there is a more precise description of their role. In addition, some of the specific roles are open to interpretation; for example 'instructor (inc. sports coach)' may include various types of 'instructors', depending on what individual schools choose to include in this category. Therefore, some caution should be used when interpreting these findings; they should be viewed as providing an *indicator* of variations between teachers, rather than robust evidence.

Table 8 includes selected categories only: those that are not covered more comprehensively elsewhere (e.g. head teachers and classroom teachers are covered in the analysis by leadership role) and those with sufficiently large numbers for reliable analysis. Table 8 includes coverage of two subject specialisms: music tuition and instructors (inc. sports coach). These are also covered in the analysis by subject (see above, Table 7), although this was restricted to secondary school teachers. This section shows the figures across all school settings, although again it is important to note the caveats about the reliability of this information on the teacher's role.

This analysis indicates that there was some variation by specific role. Some teachers were more likely to be over 60 years of age, such as peripatetic teachers<sup>13</sup> (12.5%), Music teachers (9.8%), advisory teachers<sup>14</sup> (9.4%) and teachers in pupil referral units

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<sup>13</sup> A peripatetic teacher is not based in one particular school but instead works in more than one establishment; usually teaches in a particular field, such as visual impairment.

<sup>14</sup> An advisory teacher visits schools to advise teachers on curriculum developments within a particular subject area.

(8.4%). By contrast, some teachers were less likely than average to be over 60 years of age: heads of year (1.1%) and heads of department (1.5%).

As noted above, a high proportion of music teachers (9.8%) were aged over 60, based on the analysis of the 'role' variable (Table 8). This is in contrast to the low proportion (1.1%) of music teachers aged over 60 when examining the main subject taught (see previous section, Table 7). This is because the two groups are different. Many of the music teachers included in the analysis of the 'role' variable are centrally employed music teachers (i.e. they are not based at a single school), whereas the analysis of main subject taught is limited to teachers based in secondary schools.

**Table 8 Age profile by specific role: teachers in all settings**

	<b>Specific role</b>			
	<b>Head of department</b>	<b>Head of year</b>	<b>SEN co-ordinator</b>	<b>Advisory teacher</b>
(Base)	(18,761)	(2,827)	(3,628)	(1,549)
<b>Average age</b>	<b>41</b>	<b>40</b>	<b>45</b>	<b>49</b>
<b>% aged over 60</b>	<b>1.5</b>	<b>1.1</b>	<b>4.4</b>	<b>9.4</b>
- % aged 61-65	1.3	1.0	3.5	7.2
- % aged over 65	0.2	0.1	0.9	2.2
	<b>Instructor (inc. sports coach)</b>	<b>Music tuition</b>	<b>Teacher in pupil referral unit</b>	<b>Peripatetic teacher</b>
(Base)	(815)	(1,954)	(2,001)	(576)
<b>Average age</b>	<b>42</b>	<b>46</b>	<b>46</b>	<b>48</b>
<b>% aged over 60</b>	<b>4.4</b>	<b>9.8</b>	<b>8.4</b>	<b>12.5</b>
- % aged 61-65	2.8	5.5	5.8	7.5
- % aged over 65	1.6	4.4	2.5	5.0

Base: All teachers in England with a valid TRN, 2014 (491,482); Source: SWC.

Note: Table includes selected categories only; table excludes the following categories (459,371 cases in total): head, executive head, assistant head, deputy head, classroom teacher, advisory teacher, head of house, miscellaneous teaching service for the LA, other pupil support, teacher engaged for non-school education, teacher engaged to teach in miscellaneous establishments, other.

## 2.3 Retirement age

The average age at which teachers retire was generally consistent across various school and teacher characteristics. For example, when analysing by leadership role, the average retirement age was very similar for head teachers (59.0 years), those in senior and middle leadership posts (58.6 years) and classroom teachers (59.1 years). The average retirement age overall was 59.0 years.

The only groups that had a substantively higher average retirement age were:

- Teachers working part-time (59.6 years); and,
- Teachers in some specific roles: music tuition<sup>15</sup> (60.6 years) and peripatetic teachers (60.2 years).

This analysis is based on the average age across all types of retirement. The next section looks at the different types of retirement, including ill-health retirement.

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<sup>15</sup> In the analysis of teachers' roles, the group of teachers who are covered under 'music tuition' includes many teachers who are centrally employed (i.e. not based at a single school).

### 3. Overview of types of retirement

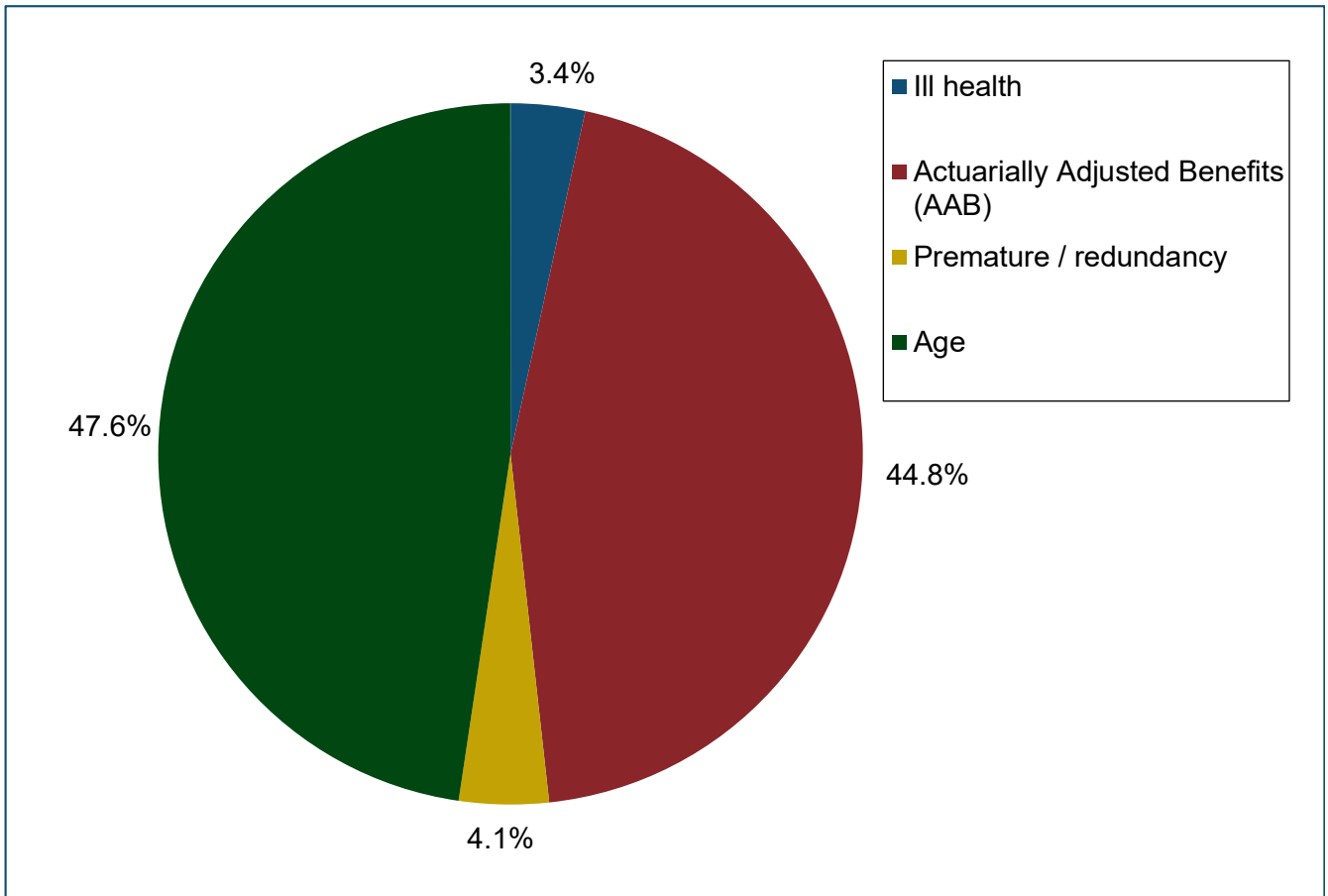
This section looks at the different types of retirement taken by teachers: the proportions who retire early, either due to ill-health or for other reasons, and the proportion that take age-based retirement. The section also examines the age at which teachers retire in the different retirement groups.

#### 3.1 Types of retirement among teachers

Figure 2 shows the proportion of teachers that took different types of retirement between 2010 and 2014. A small proportion of teacher retirements were due to ill-health (3.4% - 1,952 out of 56,786). The most common types of retirement were actuarially adjusted benefits (AAB) (44.8%) and age retirement (47.6%). It is important to note that the data in this section relates to teachers in the School Workforce Census (SWC), i.e. **teachers in state-funded schools** (excluding sixth form colleges) in England. Data on retirement and pensions from other sources may cover a different population (e.g. teachers in non-school settings such as higher and further education, and/or covering all of the UK rather than just England).

The rate of ill-health retirements has remained constant over recent years, having previously been significantly higher until changes were made to the incapacity criteria, application process and benefit structure to ensure these benefits are better targeted to need (TWLR Interim 2017). Current rates are broadly consistent with those for other workforces. Findings from the Rapid Evidence Assessment report by ICF (2017) found that AAB retirements have increased in recent years, while premature/redundancy retirements have decreased.

Figure 2 Proportions in different retirement types



Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data

## 3.2 Retirement age and types of retirement

Table 9 examines the retirement age among teachers taking each of the various types of retirement. Note that, throughout the report, ‘retirement’ is taken to mean the last day of a teacher’s service, rather than when s/he started claiming a pension. In the case of phased retirements, for example, teachers can start claiming their pensions some time before they stop teaching. Conversely, teachers who take AAB retirement can only start claiming their pension when they reach the age of 55, but may stop working at an earlier age.

As might be expected, the average age for ill-health retirement (52.6 years) was lower than for other types of retirement. In fact, around one in four teachers who took ill-health retirement stopped teaching before the age of 50. Teachers cannot start claiming other types of retirement pension until they are at least 55 years of age, and this is reflected in the figures for retirement age shown in Table 9. However, as noted above, teachers may stop teaching at an earlier age, and this is shown by the proportion of teachers taking AAB retirement who retired (stopped teaching) before the age of 55 (9%).

**Table 9 Retirement age, by type of retirement**

	Type of retirement			
	Ill-health	AAB	Premature/ redundancy	Age
(Base)	(1,952)	(25,430)	(2,351)	(27,053)
Mean retirement age (years)	52.6	57.1	58.5	61.2
	%	%	%	%
Under 50	24	*	*	*
50-54	30	9	1	*
55-59	43	85	80	14
60 or over	3	5	19	86

Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data

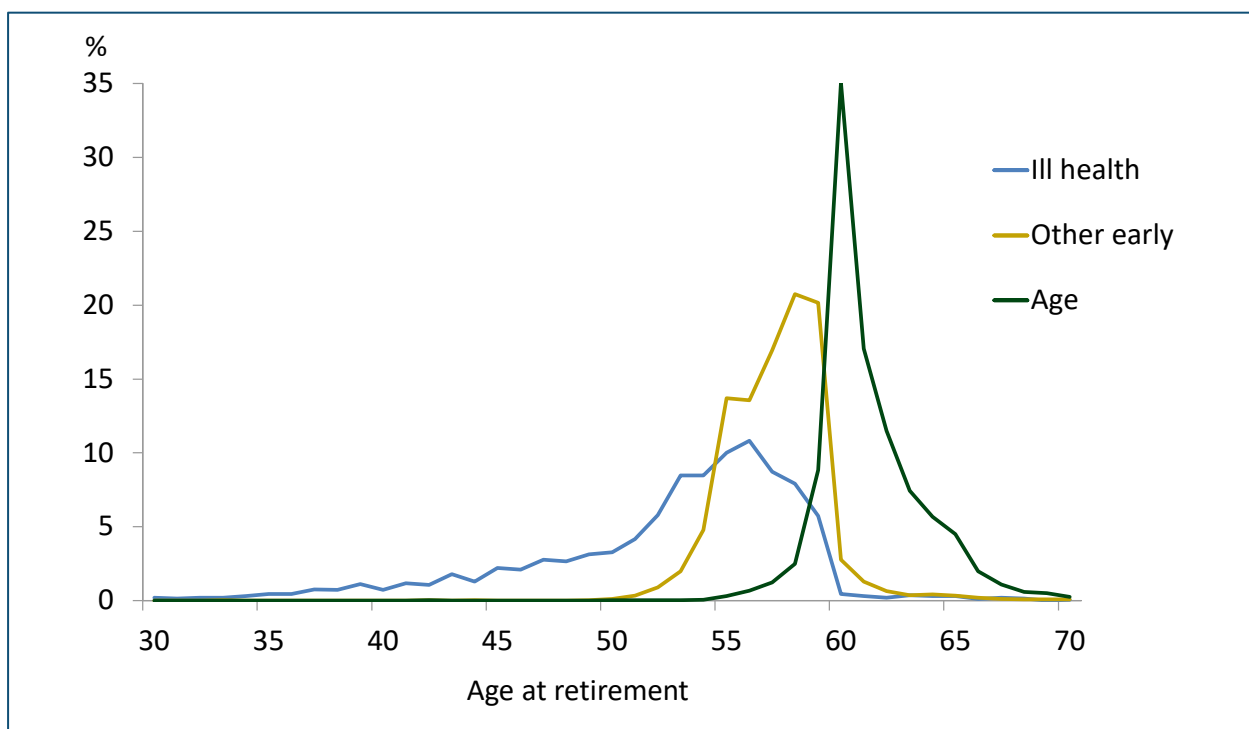
Note: an asterisk (\*) denotes a percentage of less than 0.5 but greater than 0.



Figure 3 provides a more detailed examination of retirement age due to ill-health, compared with other types of retirement. In this chart, AAB, phased and premature/redundancy retirements are combined into the 'other early' category. This confirms that teachers taking ill-health retirement tended to retire at a younger age, and that there is quite a wide spread of ages among those taking ill-health retirement.

According to the report by ICF (2017), the average age at which teachers take up a pension has not altered considerably over the past ten years, but the trend is a rising age. The average age of retirement for age-related pensions and premature retirement has increased slightly. The only type of pension where the average age has decreased has been for ill-health pensions.

**Figure 3 Distribution of retirement age, by type of retirement**



Base: All teachers in England who retired between 2010 and 2014 (56,786); Individual bases: Ill-health 1,952; Other early 27,781; Age 27,053. Source: SWC and TPS data

As noted above, the average retirement age due to ill-health was 52.6 years. The analysis looked at the extent to which this varied between different types of teacher. Where there were sufficient numbers of cases for analysis, the average retirement age due to ill-health was very consistent across different groups of teachers, at around 52-53 years of age.

## 4. Which teachers retire early due to ill-health?

This section examines the characteristics of teachers that retired early due to ill-health, in comparison with teachers who took other types of retirement. This helps to identify whether any groups of teachers were more (or less) likely to take ill-health retirement. All of the analysis in this section focuses on teachers who retired between 2010 and 2014 (56,786 teachers).

As shown in the previous section, only a small minority (3.4%) of teacher retirements were due to ill-health. Furthermore, the eligibility for ill-health retirement is based on specific criteria, which will result in some teachers having their claim accepted and some rejected. It is important to note that teachers cite health as one of the most likely reasons why they may leave the profession early (Hutchings *et al.*, 2008, referenced in Pollard *et al.*, 2017). As a result, ill-health retirements do not represent the full population of teachers who experience health problems or whose retirement may be influenced (at least in part) by health issues.

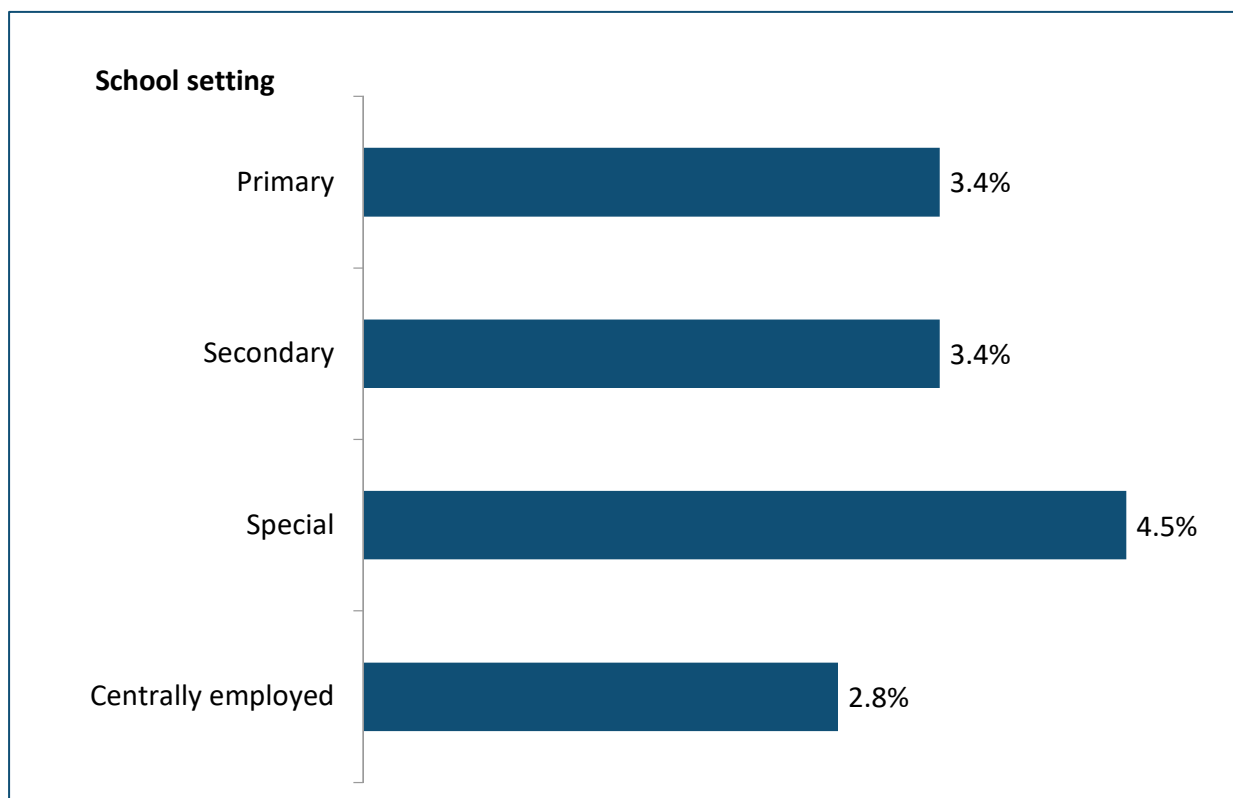
### 4.1 School-based characteristics

#### School setting

Firstly, looking at the characteristics of ill-health retirements in relation to the type of school that teachers work in, Figure 4 shows the proportion of retirees who took ill-health retirement between 2010 and 2014, in different school settings.

The same proportions of primary and secondary school teachers took ill-health retirement (3.4%). Special school teachers were slightly more likely to take ill-health retirement (4.5%), while centrally employed teachers were slightly less likely to do so (2.8%). Overall, however, there is little variation between the different groups, a pattern that is demonstrated throughout the report.

**Figure 4 Proportion of ill-health retirements, by school setting**



Base: All teachers in England who retired between 2010 and 2014 (56,786); Individual bases: Primary 23,582; Secondary 26,163; Special 3,435; Centrally employed 3,236. Source: SWC and TPS data.  
 Note: Table includes selected categories only; table excludes nursery school teachers (370 cases).

Table 10 provides more detail, by showing the incidence of different types of retirement. This shows that centrally employed teachers were least likely to take ill-health retirement (2.8%), and were most likely to take age retirement (55.3%). Secondary school teachers were least likely to take age retirement: in addition to those retiring early due to ill-health (3.4%), more than half (52.0%) took other forms of early retirement.

**Table 10 Proportion of ill-health retirements, by school setting**

	Setting			
	Primary	Secondary	Special	Centrally employed
(Base)	(23,582)	(26,163)	(3,435)	(3,236)
<b>Type of retirement</b>	%	%	%	%
Ill-health	3.4	3.4	4.5	2.8
Other early retirement	47.0	52.0	46.1	41.9
Age	49.6	44.6	49.4	55.3

Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data.  
 Note: Table includes selected categories only; table excludes nursery school teachers (370 cases).

## School Type

There was very little variation in the incidence of ill-health retirement according to school type (Table 11). The proportions of teachers taking ill-health retirement ranged from 3.1% in foundation schools and in voluntary aided or controlled schools to 3.8% in community schools. There was also very little variation in relation to the other forms of retirement.

**Table 11 Proportion of ill-health retirements, by school type**

	School type			
	Academy	Community school	Voluntary aided/controlled	Foundation
(Base)	(9,988)	(18,275)	(7,854)	(3,857)
<b>Type of retirement</b>	%	%	%	%
Ill-health	3.7	3.8	3.1	3.1
Other early retirement	49.3	48.9	48.5	51.3
Age	47.0	47.3	48.4	45.5

Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data.

Note: Table includes selected categories only; table excludes 'other', 'none' and not specified in the SWC (16,812 cases).

## School location

Information on schools' location was added to the database, using data that is publicly available from gov.uk<sup>16</sup>. This allowed analysis by urban and rural areas. Data on the type of area was available and successfully matched with 41,163 of the 56,786 cases in the main database, using the school's unique reference number (URN).

Table 12 shows that there was very slight variation in the proportion of teachers taking ill-health retirement, from 3.3% in rural areas to 3.6% in urban conurbations.

**Table 12 Proportion of ill-health retirements, by type of area**

	Type of area		
	Rural	Town or city	Urban conurbation
(Base)	(6,825)	(18,294)	(16,044)
<b>Type of retirement</b>	%	%	%
Ill-health	3.3	3.5	3.6
Other early retirement	49.8	49.0	48.0
Age	46.9	47.5	48.4

Base: All teachers in England who retired between 2010 and 2014, where information was available on type of area (41,163); Source: SWC, TPS data and gov.uk data.

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<sup>16</sup> <https://www.compare-school-performance.service.gov.uk/download-data>, accessed 16 November 2016. Additional data from this source was used in the analysis of pupil characteristics (see the later section in this report).

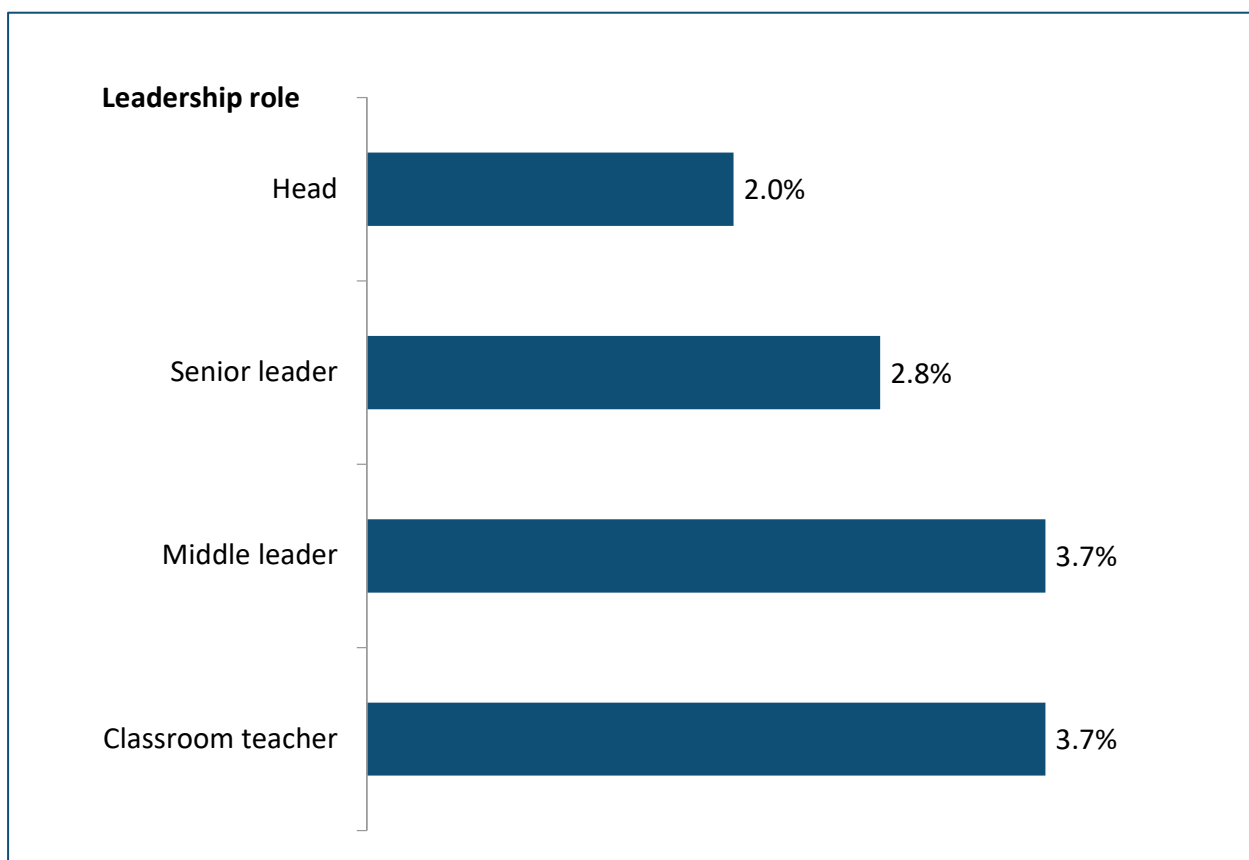
## 4.2 Teacher characteristics

This section looks at variations in the proportion of ill-health retirement in relation to teacher characteristics: their leadership role, teaching role, working hours and gender.

### Leadership role

As seen in Figure 5, there were differences in relation to teachers' leadership role. Head teachers were less likely than other teachers to retire due to ill-health (2.0%), while this increased slightly among senior leaders (2.8%), before increasing further among middle leaders and classroom teachers (3.7% in each case).

Figure 5 Proportion of ill-health retirements, by leadership role



Base: All teachers in England who retired between 2010 and 2014 (56,786); Individual bases: Head teacher 6,000; Senior leader 5,722; Middle leader 12,651; Classroom teacher 32,286. Source: SWC and TPS data. Note: Table excludes cases where leadership status is not specified in the SWC (127 cases).

More detailed findings are shown in Table 13. This shows that compared to other leadership roles senior leaders were most likely to take other forms of early retirement (other than ill-health), and that classroom teachers were most likely to take age retirement.

**Table 13 Proportion of ill-health retirements, by leadership role**

	Teacher's leadership role			
	Head teacher	Senior leader	Middle leader	Classroom teacher
(Base)	(6,000)	(5,722)	(12,651)	(32,286)
<b>Type of retirement</b>	%	%	%	%
Ill-health	2.0	2.8	3.7	3.7
Other early retirement	50.8	53.7	51.5	46.7
Age	47.2	43.5	44.8	49.5

Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data.

Note: Table excludes cases where leadership status is not specified in the SWC (127 cases).

Analysis by pay scale<sup>17</sup> shows a similar pattern (Table 14). Teachers in the leadership group pay range were least likely to retire early due to ill-health (2.3%). This proportion increased among those in the teachers upper pay range (3.5%) and increased further among those in the teachers main pay range (5.0%).

Other types of early retirement were more common among those in the leadership pay range (52.2%) and those in the teachers upper pay range (49.0%), ahead of those in the teachers main pay range (41.5%). Teachers in the main pay range were most likely to take age retirement (53.5%).

Note that Table 14 shows the three main pay scale categories from the SWC; other categories have been excluded from the analysis, as they all include a small number of cases only.

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<sup>17</sup> The pay structure for classroom teachers is in two parts: the main pay scale and the upper pay scale. The main pay scale has six points. Teachers progress by one point for each year of teaching experience. When they reach the maximum point (point 6) of the main pay scale, teachers are able to apply to move on to the upper pay scale; applications are assessed against national standards, Successful applications result in access to the three-point upper pay scale, progression through which is related to performance. Teachers are able to progress by one point every two years. Head teachers and deputy and assistant head teachers are classified as Leadership Group teachers and are paid on the separate Leadership Group pay scale. Leadership Group teachers are placed on 5 or 7 point pay ranges and progression on those pay ranges is again related to performance.

**Table 14 Proportion of ill-health retirements, by pay scale**

	Pay scale		
	Leadership	Teachers upper	Teachers main
(Base)	(10,352)	(29,211)	(4,183)
<b>Type of retirement</b>	%	%	%
Ill-health	2.3	3.5	5.0
Other early retirement	52.2	49.0	41.5
Age	45.5	47.5	53.5

Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data.

Note: Table includes selected categories only; table excludes the following categories (13,040 cases in total): advanced skills teachers, excellent teachers, leading practitioners, National Joint Council, Soulbury, unqualified teachers, other null.

As well as being less likely to retire early due to ill-health, the Rapid Evidence Assessment conducted by ICF (2017) also noted that teachers in leadership and management positions are less likely than classroom teachers to have an incidence of absence.

## Main subject taught

The SWC includes information on the subjects taught by teachers, although this is only provided for secondary school teachers. Table 7 shows analysis of retirement according to the main subject taught.

Overall, the figures were very consistent across the different subjects, although secondary school teachers were slightly less likely to take ill-health retirement if they were teaching the following subjects: Drama (1.3%), Religious Education (1.7%), Modern Foreign Languages (MFL) (1.8%) and History (1.8%). The one subject where there was a relatively high proportion of ill-health retirements was Information and Communications Technology (ICT) (3.7%).

Secondary school teachers in some subjects were more likely than average to take some form of early retirement (ill-health or other type of early retirement): Physical Education (PE)/Sports (67.9%), Music (63.5%) and Geography (60.8%).



Table 15 Proportion of ill-health retirements, by main subject taught

	Main subject taught			
	Art and Design	Science	Business Studies	Citizenship or PSHE
(Base)	(687)	(2,146)	(438)	(599)
<b>Type of retirement</b>	%	%	%	%
Ill-health	2.3	2.7	3.2	2.3
Other early retirement	48.8	53.7	48.2	54.6
Age	48.9	43.7	48.6	43.1
	Design and Technology	Drama	English	Modern Foreign Language
(Base)	(1,806)	(310)	(2,165)	(1,228)
<b>Type of retirement</b>	%	%	%	%
Ill-health	2.7	1.3	2.2	1.8
Other early retirement	52.7	52.9	52.7	52.7
Age	44.7	45.8	45.1	45.5
	Geography	History	ICT	Mathematics
(Base)	(771)	(727)	(677)	(2,189)
<b>Type of retirement</b>	%	%	%	%
Ill-health	2.5	1.8	3.7	2.8
Other early retirement	58.4	53.1	52.6	50.2
Age	39.2	45.1	43.7	47.0
	Music	PE/Sports	Religious Education	Other
(Base)	(304)	(741)	(593)	(1,537)
<b>Type of retirement</b>	%	%	%	%
Ill-health	2.6	3.0	1.7	2.8
Other early retirement	60.9	64.9	56.0	48.9
Age	36.5	32.1	42.3	48.3

Base: All secondary school teachers in England who retired between 2010 and 2014, and with information available on subject taught (16,918); Source: SWC and TPS data

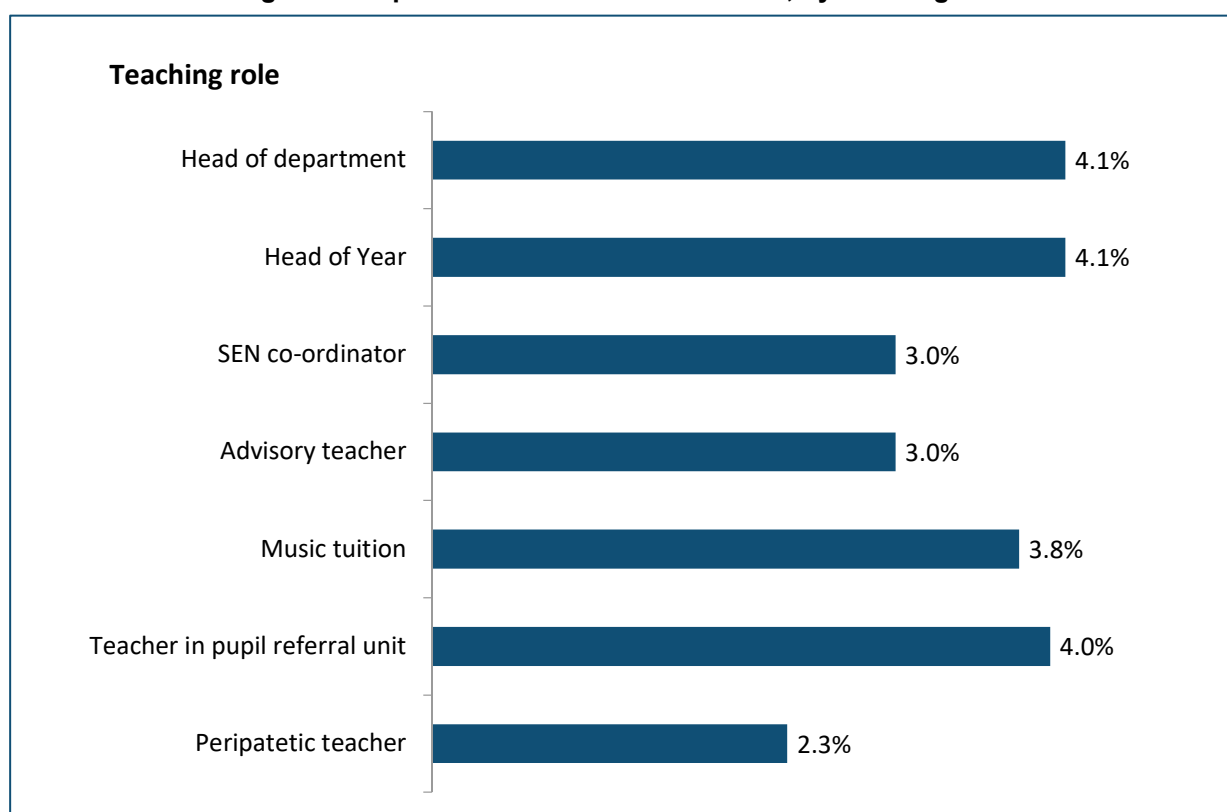
## Teaching role

Figure 6 shows the incidence of ill-health retirement for specific teaching roles. As noted earlier in the report, the data on teaching role is not complete for all teachers, and there is some variation in the way that individual roles are recorded in schools' SWC returns. Therefore, some caution should be used when interpreting these findings.

Figure 6 includes selected categories only: those that are not covered elsewhere (e.g. head teachers) and those with sufficiently large numbers for reliable analysis.

This analysis shows only a small amount of variation by specific role. The proportions taking ill-health retirement were slightly higher among heads of department (4.1%) and heads of year (4.1%), but were slightly lower than average among peripatetic teachers (2.3%).

**Figure 6 Proportion of ill-health retirements, by teaching role**



Base: All teachers in England who retired between 2010 and 2014 (56,786); Individual bases: Head of department 2,133; Head of year 315; SEN co-ordinator 496; Advisory teacher 540; Music tuition 319; Teacher in pupil referral unit 473; Peripatetic teacher 217. Source: SWC and TPS data.

Note: Table includes selected categories only; table excludes the following categories (52,293 cases in total): head, executive head, assistant head, deputy head, classroom teacher, advisory teacher, head of house, instructor (inc. sports coach), miscellaneous teaching service for the LA, other pupil support, teacher engaged for non-school education, teacher engaged to teach in miscellaneous establishments, other.

## Working hours

Teachers working full-time were more likely to retire early due to ill-health than teachers working part-time (3.7% compared with 3.0%); see Table 16. They were also more likely to take other types of early retirement (52.2% compared with 43.9%). As discussed earlier in the report, some caution should be used when interpreting these results.

Previous research has noted that there is a tendency for teachers to transition into part-time work as they approach retirement (DfES, 2007, referenced in Pollard *et al.*, 2017). However, the current analysis does not assess the extent to which teachers may have reduced their hours in the approach to their retirement, or alternatively may have worked part-time for a longer period of time. It is, therefore, difficult to conclude whether teachers' hours had an impact on their ability to continue working.

**Table 16 Proportion of ill-health retirements, by working hours**

	Working hours	
	Full-time	Part-time
(Base)	(34,409)	(22,250)
<b>Type of retirement</b>	%	%
Ill-health	3.7	3.0
Other early retirement	52.2	43.9
Age	44.1	53.1

Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data.

Note: Table excludes cases where full-time/part-time status is not specified in the SWC (127 cases).

As well as being less likely to retire early due to ill-health (or take other forms of early retirement), previous analysis (by ICF, 2017) indicates that part-time staff may be less likely to take sick leave, at least in the period approaching retirement age. The analysis found that, among teachers aged over 55, the incidence of sick leave was much lower for part-time workers than full-time workers. However, the duration of sick leave for part-time workers was generally higher than for full-time workers (ICF, 2017).

## Teacher's gender

Female teachers were marginally more likely than male teachers to take ill-health retirement (3.5% compared with 3.3%); see Table 17. However, male teachers were more likely to take other forms of early retirement (52.8% compared with 47.3%).

**Table 17 Proportion of ill-health retirements, by teacher's gender**

	Teacher's gender	
	Female	Male
(Base)	(40,190)	(16,579)
<b>Type of retirement</b>	%	%
Ill-health	3.5	3.3
Other early retirement	47.3	52.8
Age	49.2	43.8

Base: All teachers in England who retired between 2010 and 2014 (56,786); Source: SWC and TPS data.

Note: Table excludes cases where gender is not specified in the SWC (17 cases).

Further analysis shows some variations when looking at school setting alongside gender:

- Among female teachers, those in secondary schools were slightly more likely to take ill-health retirement than those in primary schools (3.6% compared with 3.3%).
- Among men, however, the opposite was the case: those in primary schools were more likely to retire early due to ill-health, compared with those in secondary schools (3.6% compared with 3.2%).

### 4.3 Pupil characteristics

One of the project aims was to examine the characteristics of schools from which teachers retire on ill-health grounds, specifically in relation to pupil characteristics, as well as school and leadership factors, such as the school's history of Ofsted grades, leadership turnover, and the proportion of budget spent on supply teachers. This section focuses on pupil characteristics; specifically pupil absence, eligibility for free school meals (FSM), special educational needs (SEN) and attainment at Key Stages 2 and 4. This information was merged into the main database from publicly available data on the gov.uk website<sup>18</sup>, using the 'URN' school reference number. The main database covers the period 2010-2014, but data on pupil characteristics is available only on an annual basis, covering data for each year. Therefore, it was decided to take school-level data from 2014, as this would give the best match with the rest of the data. The number of records matched to the main database varied according to the individual variable.

It was not possible to examine the other school-level characteristics suggested by the Teachers' Working Longer Review (as outlined in the Introduction, section 1.2), as this data was not available at the school or teacher level.

<sup>18</sup> <https://www.compare-school-performance.service.gov.uk/download-data>, accessed 16 November 2016.

This analysis was conducted at the school level, showing whether certain types of schools are more (or less) likely to have a high proportion of teachers retiring due to ill-health. Figures are based on all schools in England where at least one teacher retired between 2010 and 2014 (17,962 schools).

Overall, the analysis suggests that there is a link between the incidence of ill-health retirement and various forms of pupil 'disadvantage'. In this context, it is worth noting the evidence shown by the recent report by Pollard *et al.* (2017). This referred to econometric analysis, showing a significant association between school disadvantage and turnover rate of teachers (Allen *et al.*, 2012, referenced in Pollard *et al.*, 2017).

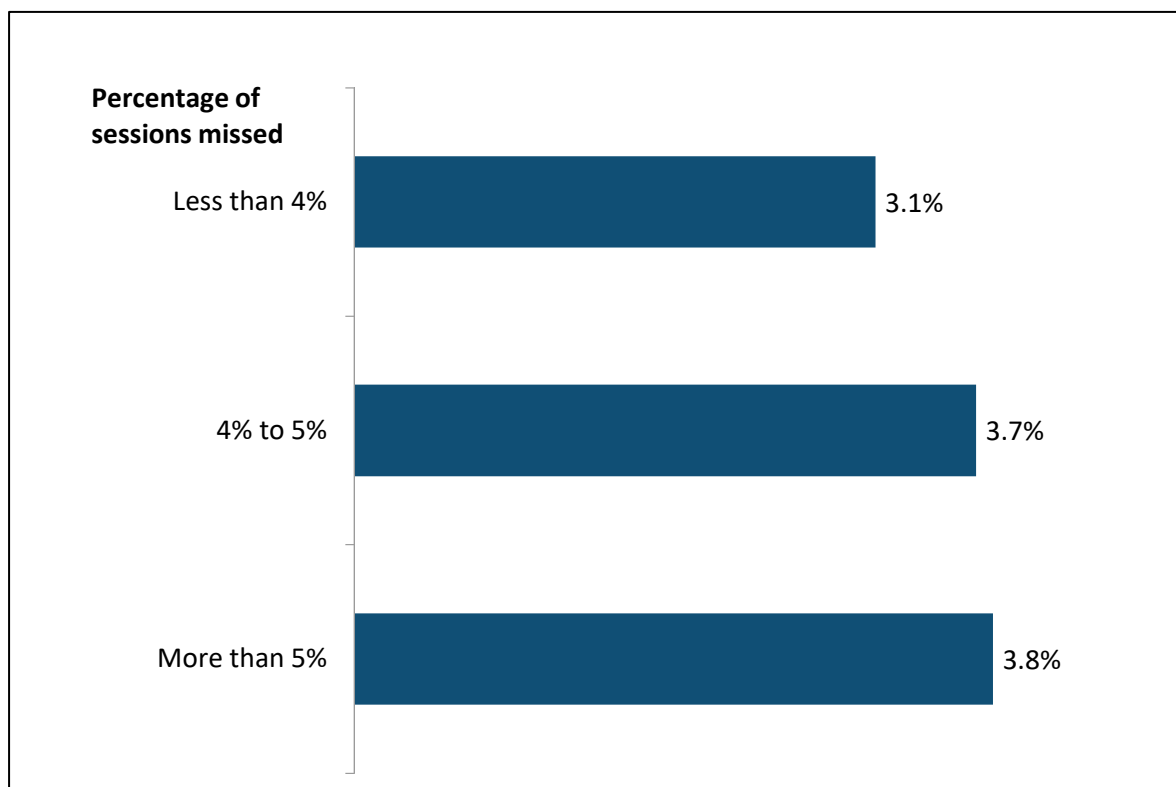
## **Pupil absence**

Analysis by pupil absence<sup>19</sup> shows a slight variation in the proportion of ill-health retirements (see Figure 7). In schools with low levels of pupil absence (defined as less than 4% of sessions missed), teachers were slightly less likely to take ill-health retirement (3.1%). The proportion was slightly higher in schools where pupils absence was higher, at 3.7% in schools where between 4% and 5% of sessions were missed, and 3.8% in schools where 5% or more sessions were missed.

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<sup>19</sup> Analysis is based on the "percentage of possible sessions recorded as an absence from school for whatever reason, whether authorised or unauthorised."

**Figure 7 Proportion of ill-health retirements, by pupil absence**



Base: All schools in England where there were teacher retirements between 2010 and 2014 and where pupil absence data is available (14,959); Individual bases: Less than 4% 6,547; 4-5% 4,474; More than 5% 3,938.  
Source: SWC, TPS data and gov.uk data.

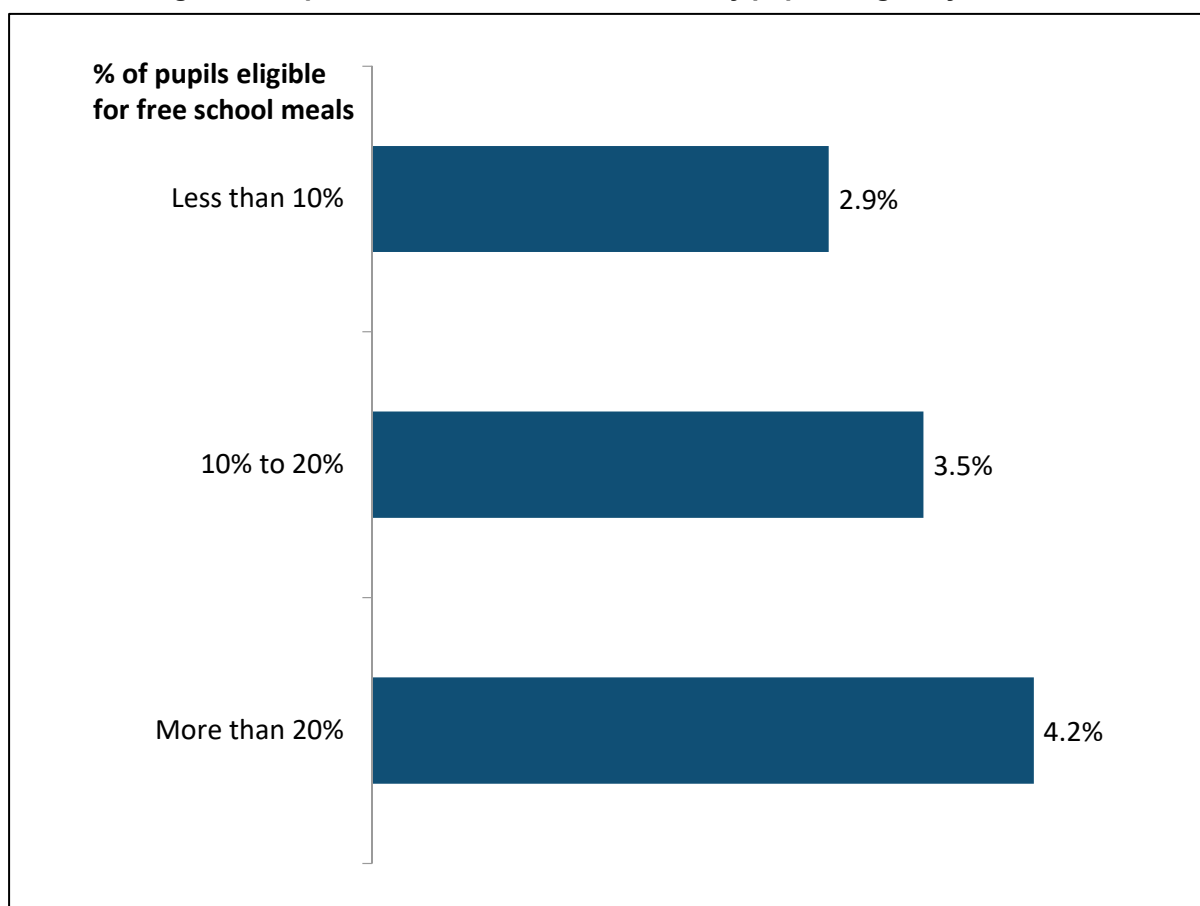
## Eligibility for free school meals (FSM)

Figure 8 shows the proportion of teachers taking ill-health retirement, according to the number of pupils at each school who were eligible for FSM. Overall, 14.3% of pupils are eligible for FSM<sup>20</sup>; for analysis purposes, schools were divided into three approximately equal groups based on the proportion of pupils eligible for FSM: less than 10%, 10-20%, and more than 20%. In schools with a high proportion of pupils eligible for FSM (defined as more than 20% of pupils), teachers were more likely to retire early due to ill-health (4.2%). The proportion was lower in schools where fewer pupils were eligible for FSM: 3.5% in schools where between 10% and 20% of pupils were eligible, and 2.9% where less than 10% of pupils were eligible.

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<sup>20</sup> Data taken from <https://www.gov.uk/government/statistics/schools-pupils-and-their-characteristics-january-2016>, Accessed 15 December, 2016

**Figure 8 Proportion of ill-health retirements, by pupils' eligibility for FSM**



Base: All schools in England where there were teacher retirements between 2010 and 2014 and where data on eligibility for FSM is available (14,511); Individual bases: Less than 10% 5,268; 10-20% 3,899; More than 20% 5,344. Source: SWC, TPS data and gov.uk data.

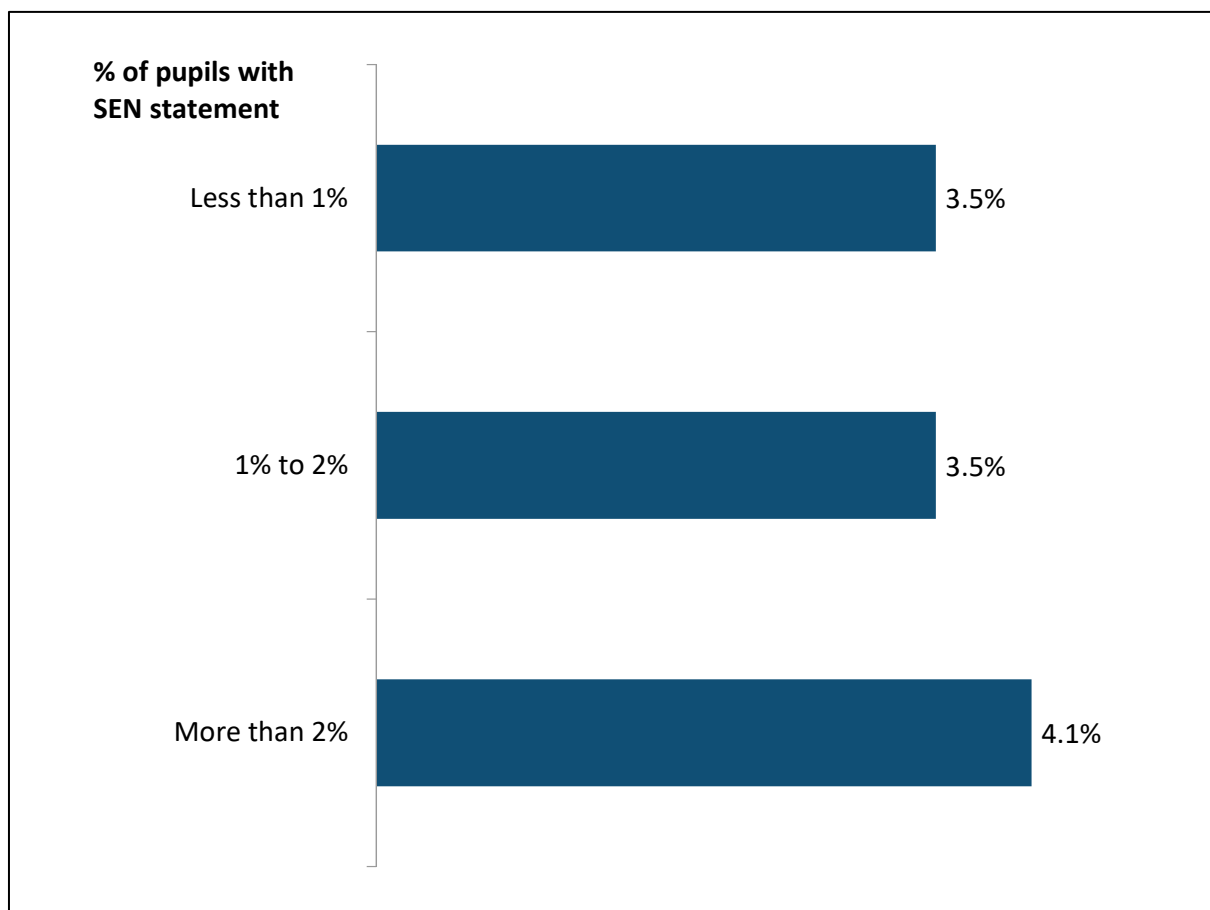
## Pupils with SEN statements

Turning to the findings in relation to pupils with statements of special educational need (SEN)<sup>21</sup>, there was only a marginal difference on this measure: in schools with a higher proportion of pupils with SEN statements (defined as more than 2% of pupils having an SEN), teachers were slightly more likely to take ill-health retirement (4.1%), compared with other schools (see Figure 9).

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<sup>21</sup> For analysis purposes, schools were divided into three approximately equal groups based on the proportion of pupils with a statement of SEN: less than 1%, 1-2%, and more than 2%.

**Figure 9 Proportion of ill-health retirements, by pupils with statements of SEN**



Base: All schools in England where there were teacher retirements between 2010 and 2014 and where data on pupils with SEN statements is available (11,157); Individual bases: Less than 1% 3,487; 1-2% 3,544; More than 2% 4,126. Source: SWC, TPS data and gov.uk data.

## Pupil attainment

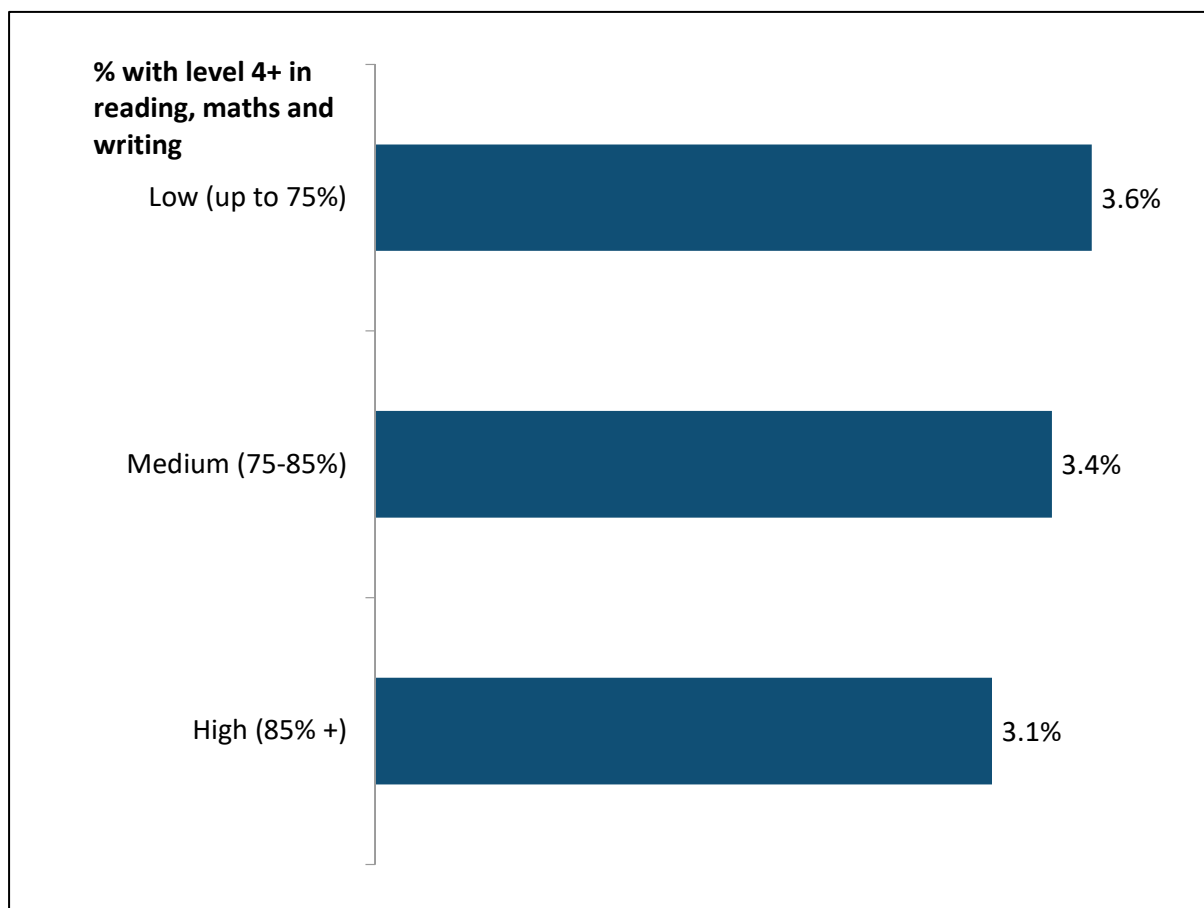
Looking at the incidence of ill-health retirement in relation to pupil attainment, there was a slight variation according to Key Stage 2 attainment figures<sup>22</sup>: in primary schools with low attainment levels (where no more than 75% of pupils reached at least Level 4 in reading, maths and writing), teachers were more likely to take ill-health retirement (3.6%), and this proportion fell (to 3.1%) in schools with high levels of attainment (85% of pupils or more reaching at least Level 4 in reading, maths and writing); see Figure 10.

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<sup>22</sup> In 2014, 79% of pupils reached at least Level 4 in reading, maths and writing at Key Stage 2; Data taken from [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/428838/SFR50\\_2014\\_Text.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428838/SFR50_2014_Text.pdf), Accessed 15 December, 2016. For analysis purposes, schools were divided into three approximately equal groups based on the proportion of pupils who reached at least Level 4: up to 75%, 75-85%, 85% or more.



**Figure 10 Proportion of ill-health retirements, by pupils' attainment at Key Stage 2**

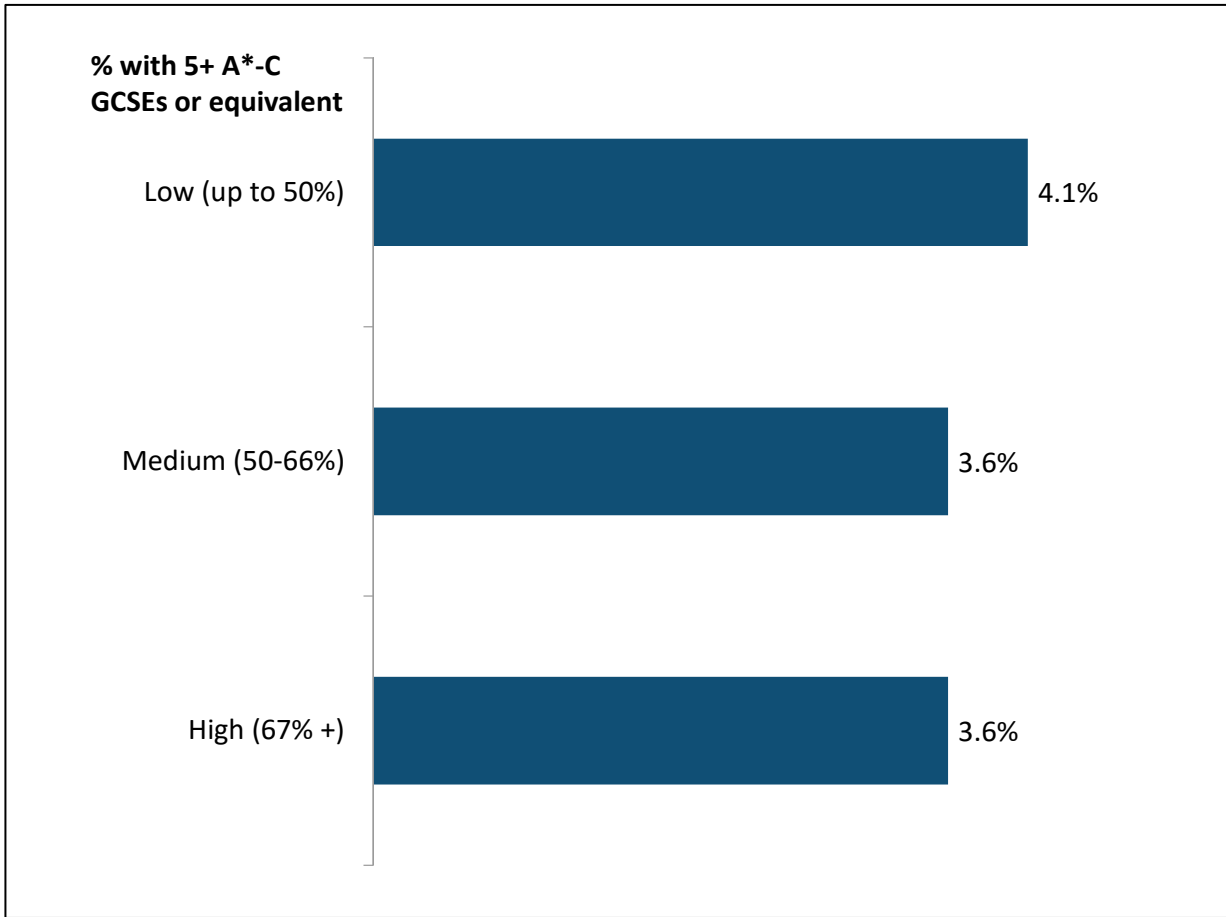


Base: All primary schools in England where there were teacher retirements between 2010 and 2014 and where data on Key Stage 2 attainment is available (9,814); Individual bases: Low 3,004; Medium 3,049; High 3,761.  
Source: SWC, TPS data and gov.uk data.

There is a slight variation when looking at Key Stage 4<sup>23</sup>. In secondary schools with low attainment levels (where no more than half of pupils achieved five or more A\*-C grades at GCSE or equivalent), teachers were slightly more likely to take ill-health retirement, than in schools with high levels of attainment (where two-thirds of pupils or more achieve five or more A\*-C grades at GCSE or equivalent) (4.1% compared with 3.6%); see Figure 11.

<sup>23</sup> In 2014, 53% of pupils achieved five or more A\*-C grades at GCSE or equivalent; Data taken from [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/406314/SFR\\_02\\_2015-revised\\_GCSE\\_and\\_equivalents.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/406314/SFR_02_2015-revised_GCSE_and_equivalents.pdf), Accessed 15 December, 2016. For analysis purposes, schools were divided into three approximately equal groups based on the proportion of pupils who achieved five or more A\*-C grades at GCSE or equivalent: up to 50%, 50-66%, 67% or more.

**Figure 11 Proportion of ill-health retirements, by pupils' attainment at Key Stage 4**



Base: All secondary schools in England where there were teacher retirements between 2010 and 2014 and where data on Key Stage 4 attainment is available (3,286); Individual bases: Low 1,393; Medium 1,143; High 750. Source: SWC, TPS data and gov.uk data.

## 5. Reasons for ill-health retirement

This section looks more closely at teachers who took ill-health retirement between 2010 and 2014. The OH Assist Ltd database provides information on the medical conditions that result in ill-health retirement. The section examines the proportions of teachers experiencing different conditions, and the extent to which this varied by teacher characteristics. OH Assist Ltd data on medical conditions was available for 1,301 teachers of the 1,952 who took ill-health retirement between 2010 and 2014 (according to the TPS data).

As part of the project aims, there was a request to examine the correlation between the conditions which result in teachers retiring on ill-health grounds, the age at which they do so and the role undertaken, as well as an analysis of change over time. However, because of the relatively small number of ill-health retirements, it is not possible to analyse the correlation between conditions, age and teachers' roles. Similarly, because of the numbers concerned, it is not possible to examine change over time within the full period covered by the analysis (2010-2014).

A range of different medical conditions resulted in ill-health retirement, as shown in Table 18. For analysis purposes, individual conditions were grouped into six categories, as indicated in Table 18: cancer, mental health, diseases of the nervous system<sup>24</sup>, musculoskeletal conditions<sup>25</sup>, chronic fatigue syndrome and fibromyalgia, and all other conditions. This categorisation was carried out in consultation with a doctor working for OH Assist Ltd.

Teachers were most likely to be affected by cancer (23%), mental health conditions (20%) and diseases of the nervous system (19%). A slightly smaller proportion (15%) were affected by musculoskeletal conditions.

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<sup>24</sup> Problems of the nervous system include multiple sclerosis (MS), Alzheimer's disease, Parkinson's disease, epilepsy, shingles and stroke.

<sup>25</sup> Musculoskeletal (MSK) disorders include back pain, neck or arm strains and diseases of the joints.

**Table 18 Medical conditions resulting in ill-health retirement**

	%
<b>Cancer (neoplasms)</b>	23
<b>Mental health (Mental and behavioural disorders)</b>	20
<b>Diseases of the nervous system</b>	19
<b>Musculoskeletal</b>	15
- Diseases of the musculoskeletal system and connective tissue (back)	6
- Diseases of the musculoskeletal system and connective tissue (non-back)	9
<b>Chronic fatigue syndrome and fibromyalgia</b>	4
- Chronic fatigue syndrome	3
- Fibromyalgia	1
<b>Other</b>	19
- Diseases of the circulatory system	4
- Diseases of the ear and mastoid process	3
- Diseases of the respiratory system	3
- Diseases of the eye and adnexa	2
- Endocrine, nutritional and metabolic diseases	2
- Diseases of the digestive system	2
- Diseases of the blood and blood-forming organs and certain disorders involving the immune mechanism	1
- Injury, poisoning and certain other consequences of external causes	1
- Diseases of the genitourinary system	1
- Certain infectious and parasitic diseases	*
- Diseases of the skin and subcutaneous tissue	*
- External causes of morbidity and mortality	*

Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (1,301). Source: SWC, TPS data and OH Assist data.

Note: an asterisk (\*) denotes a percentage of less than 0.5 but greater than 0.

The recent Rapid Evidence Assessment report by ICF (2017) noted that the proportion of teachers retiring early because of mental health conditions in England appears to be lower than the proportions reported in other countries; specifically, research from Ireland, Germany and Scotland found that 35-47% of ill-health retirements related to mental disorders (compared with 20% as seen in this analysis).

There is also some evidence comparing teachers with other professions, as noted in the report by ICF (2017). When teachers are compared to health workers, both Pattani et al. (2001) and Brown et al. (2005) found that musculoskeletal and cardiovascular disorders were more prevalent in health workers than among teachers as causes of ill-health retirement.

## 5.1 Retirement age and health conditions

On average, teachers who retired early due to ill-health stopped working at the age of 52.6 years. This varied slightly according to the type of condition, as shown in Table 19. The average retirement age for teachers affected by musculoskeletal conditions was slightly higher (54.0 years), with a lower average age among teachers affected by cancer (52.1 years) and by diseases of the nervous system (51.1 years).

**Table 19 Mean retirement age by medical condition**

	<b>Mean retirement age (years)</b>	<b>(Base)</b>
Diseases of the nervous system	51.1	(252)
Cancer (neoplasms)	52.1	(299)
Other	52.8	(293)
Mental health	53.1	(260)
Musculoskeletal	54.0	(197)

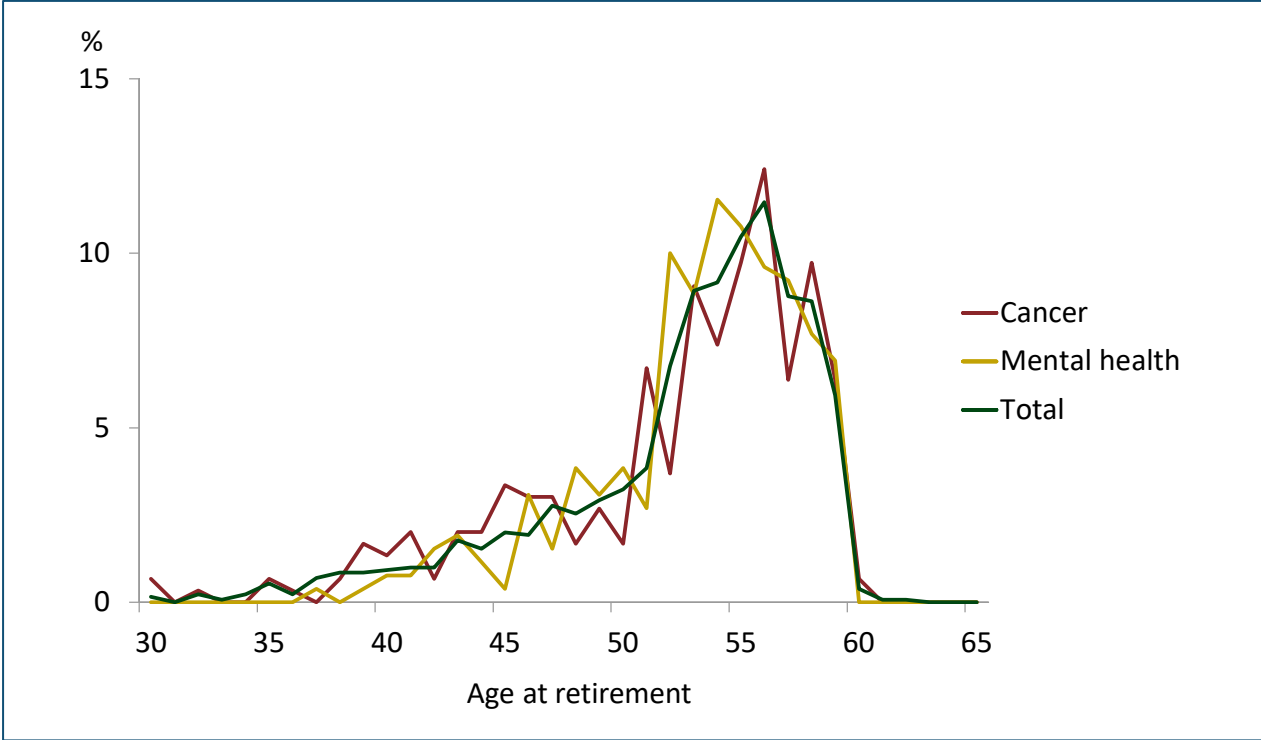
Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (1,301). Source: SWC, TPS data and OH Assist data.

Figures 12 and 13 provide more detailed information, showing the range of retirement ages for different health conditions.

Figure 12 shows the findings for teachers affected by mental health conditions and by cancer. The age distribution for teachers retiring early because of mental health conditions was broadly similar to the average for all ill-health retirements. The retirement age for teachers affected by cancer was slightly lower on average, and included more teachers retiring at a younger age.

The report produced by ICF (2017) examined the relationship between mental health conditions and teachers' age, but found no clear evidence: "*studies which examine the relationship between emotional and mental symptoms and age produce mixed findings. Some studies have concluded that older teachers are more stressed than younger teachers while others have concluded the reverse.*" The analysis shown here based on retirement age suggests that there is no distinctive age pattern for ill-health retirements caused by mental health conditions, compared with other types of conditions.

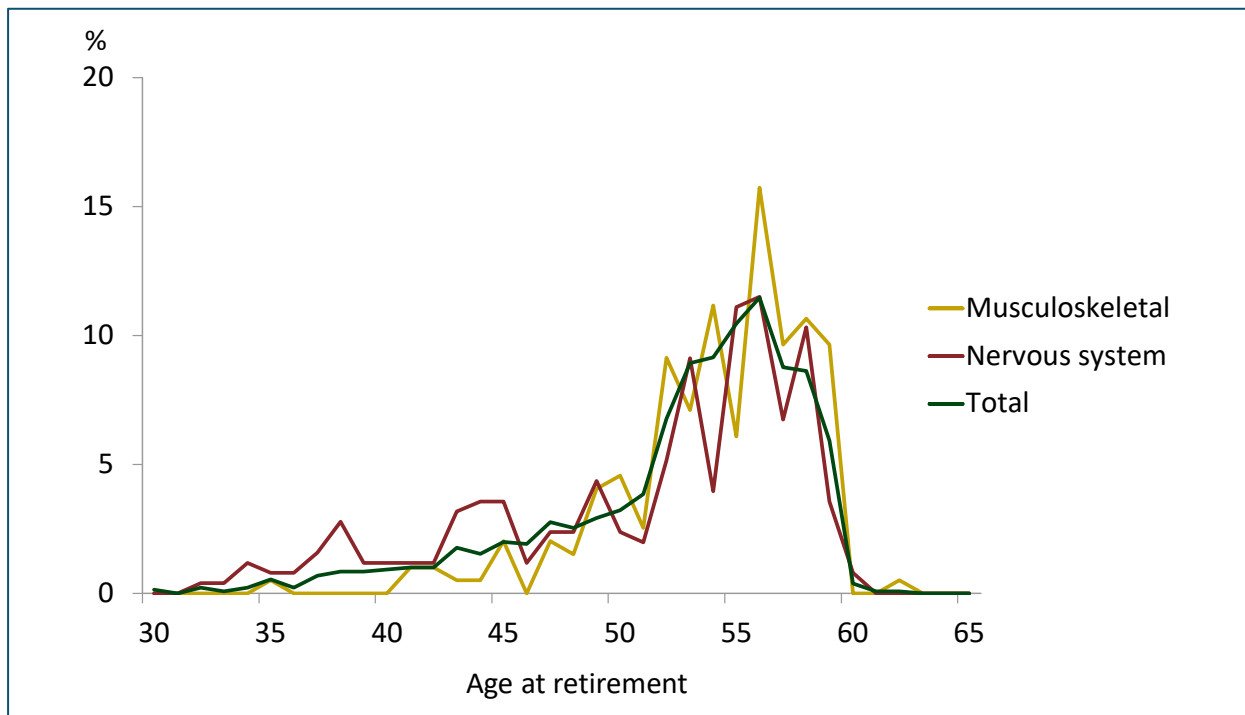
**Figure 12 Age at which teachers retire due to specific health conditions: cancer and mental health**



Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (875). Individual bases: cancer 186, mental health 179. Source: SWC, TPS data and OH Assist data.

Figure 13 shows the findings for teachers affected by musculoskeletal conditions and by diseases of the nervous system. The average age of teachers retiring early because of musculoskeletal conditions was slightly higher than for other conditions. The chart shows a relatively large concentration between the ages of 55 and 60. The retirement age for teachers affected by diseases of the nervous system was slightly lower on average, and included a relatively large proportion of teachers retiring below the age of 50.

**Figure 13 Age at which teachers retire due to specific health conditions: musculoskeletal conditions and diseases of the nervous system**



Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (875). Individual bases: musculoskeletal 139, nervous system 172. Source: SWC, TPS data and OH Assist data.

The project aims included a focus on the characteristics of teachers who retire as a result of mental health issues, and this is included in the next section. However, because of the small number of teachers in the analysis who retired early due to mental health conditions (260), it is not possible to conduct detailed analysis within this group.

## 5.2 Characteristics of teachers who retire early due to specific health conditions

This section examines the reasons for ill-health retirement, analysed by teachers' characteristics. This helps to show whether certain teachers were more or less likely to retire early due to specific health conditions. Some caution should be used in interpreting the findings in this section, due to the small numbers of teachers in different sub-groups.

## School setting

The reasons for ill-health retirement were similar between primary and secondary school teachers (Table 20). Greater differences were apparent for special school teachers, although these findings should be treated with caution because of the small number of special school teachers in the analysis (114 teachers). Special school teachers were more likely than other teachers to retire early because of mental health conditions (33%) and because of musculoskeletal conditions (22%).

**Table 20 Reason for ill-health retirement, by school setting**

	School setting		
	Primary	Secondary	Special
(Base)	(522)	(594)	(114)
	%	%	%
Cancer	25	22	18
Mental health	22	17	33
Diseases of the nervous system	19	21	16
Musculoskeletal conditions	14	15	22

Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (1,301). Source: SWC, TPS data and OH Assist data.

Note: Table includes the four most frequent response categories only, in order to exclude cells containing small numbers of individuals. Table included selected categories only for school setting; table excludes centrally employed teachers and nursery school teachers (71 cases).

## Teachers' gender

The reasons for ill-health retirement differed slightly between female and male teachers. Female teachers were more likely to retire early because of cancer and musculoskeletal conditions, while male teachers were more likely to retire because of mental health conditions and diseases of the nervous system (Table 21).

The gender difference for mental health conditions is different than for the general population as a whole. According to the Adult Psychiatric Morbidity Survey 2014, women were more likely than men to be affected by 'common mental disorders' (such as depression or anxiety) (19.1% of women compared with 12.2% of men (12.2%)), and women were also more likely than men to receive treatment for mental health conditions (McManus *et al.*, 2016).



**Table 21 Reason for ill-health retirement, by teacher's gender**

	Teacher's gender	
	Female	Male
(Base)	(905)	(396)
	%	%
Cancer	27	15
Mental health	17	26
Diseases of the nervous system	18	24
Musculoskeletal conditions	17	11
Chronic fatigue syndrome and fibromyalgia	4	3
Other	17	21

Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (1,301). Source: SWC, TPS data and OH Assist data.

## Leadership role

Table 22 shows the reasons for ill-health retirement analysed by leadership role. Because of the small number of cases, the responses for head teachers and senior leaders have been combined.

The main variations shown in Table 22 are that head teachers and senior leaders were more likely than other teachers to retire early because of cancer (33%), and were less likely to retire early because of musculoskeletal conditions (10%).

**Table 22 Reason for ill-health retirement, by leadership role**

	Leadership role		
	Head/senior leader	Middle leader	Classroom teacher
(Base)	(206)	(300)	(793)
	%	%	%
Cancer	33	23	20
Mental health	22	15	21
Diseases of the nervous system	17	19	20
Musculoskeletal conditions	10	17	16
Chronic fatigue syndrome and fibromyalgia	1	6	4
Other	17	20	18

Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (1,301). Source: SWC, TPS data and OH Assist data. Note: Table excludes cases where leadership role is not specified in the SWC (2 cases).

## Working hours

Analysis by teachers' working hours shows that teachers working full-time were more likely to retire early due to mental health conditions (23% compared with 15% of part-time teachers), while those working part-time were more likely to retire because of diseases of the nervous system (25% compared with 17%).

**Table 23 Reason for ill-health retirement, by working hours**

	Working hours	
	Full-time	Part-time
(Base)	(884)	(415)
	%	%
Cancer	24	21
Mental health	23	15
Diseases of the nervous system	17	25
Musculoskeletal conditions	15	16
Chronic fatigue syndrome and fibromyalgia	3	6
Other	19	17

Base: All teachers who took ill-health retirement between 2010 and 2014 and where data on health condition is available (1,301). Source: SWC, TPS data and OH Assist data. Note: Table excludes cases where full-time/part-time status is not specified in the SWC (2 cases).

## 6. Conclusions

This final section revisits the project aims and key questions. This helps to identify the key findings, and also to assess the extent to which the analysis was able to respond to the various questions.

*Which teachers are most likely to retire early on ill-health grounds? What are their characteristics (personal and school level)? At what age are they likely to retire? How do they differ from the wider teaching population? How do they differ from those who stay on until or beyond Normal Pension Age?*

The report has examined the characteristics of teachers who retired early due to ill-health, in comparison with other teacher retirees. The following groups of teachers were slightly more likely to take ill-health retirement: special school teachers, middle leaders and classroom teachers, those in the teachers main pay range and teachers working full-time. Teachers were also more likely to take ill-health retirement if they worked in schools with higher levels of pupil absence, or with higher proportions of pupils eligible for FSM.

The average age for ill-health retirement (52.6 years) was very consistent across different groups of teachers; it was around 52 or 53 for all groups with sufficient numbers of cases for analysis.

The analysis has focused on a comparison between teachers who retired due to ill-health and those who took other forms of retirement. A comparison with the wider teaching population is problematic, as the teachers who took ill-health retirement are older than average, and have other characteristics associated with age (e.g. greater experience, a greater likelihood of being in a senior position).

*Which teachers retire early? What are the characteristics (personal and school level) of those teachers who retire early through ill-health compared with those who retire early for other reasons?*

As noted above, the report has identified the distinctive characteristics of teachers who retired early due to ill-health. These teachers have been compared with other groups of teacher retirees: those who retired early (for reasons other than ill-health), and those who took normal age retirement.

The paragraphs above summarise the findings on the characteristics of those taking ill-health retirement. In addition, the report has shown findings for other retirement groups, as follows:

- Other forms of early retirement (excluding ill-health) were most common among secondary school teachers, senior leaders and those in the leadership pay range, teachers working full-time, and male teachers.

- The following teachers were most likely to take age retirement: classroom teachers, those in the teachers main pay range<sup>26</sup>, teachers working part-time, and female teachers.

*What can administrative data tell us about the relationship between retirement age, different teaching roles (e.g. specific teaching roles of interest include but are not restricted to early years/primary school teachers, PE teachers and leadership roles) and ill-health?*

As noted above, the average age for ill-health retirement (52.6 years overall) was very consistent across different groups of teachers; the average retirement age was around 52 or 53 years for all groups with sufficient numbers of cases for analysis.

The analysis also looked more broadly at the age at which teachers retired (for any reason). This was generally consistent across various school and teacher characteristics. For example, when analysing by leadership role, the average retirement age was highest for classroom teachers (59.1 years) and lowest for those in senior and middle leadership posts (58.6 years). The average retirement age overall is 59.0 years.

The only groups that had a substantively higher average retirement age were:

- Teachers working part-time (59.6 years); and,
- Teachers in some specific roles: Music tuition (60.6 years) and peripatetic teachers (60.2 years).

In general, the data supported robust analysis on broad teacher role (e.g. by leadership role, school setting), but there was limited information on subject and specific teaching roles. Information on the main subject taught was available for secondary school teachers only: this analysis showed that figures were very consistent across the different subjects, although secondary school teachers were slightly less likely to take ill-health retirement if they were teaching the following subjects: Drama (1.3%), Religious Education (1.7%), Modern Foreign Languages (MFL) (1.8%) and History (1.8%). The one subject where there was a relatively high proportion of ill-health retirements was Information and Communications Technology (ICT) (3.7%).

Secondary school teachers in some subjects were more likely than average to take *some form* of early retirement (ill-health or other type of early retirement): Physical Education (PE)/Sports (67.9%), Music (63.5%) and Geography (60.8%). Overall, 55.4% of secondary school teachers took some form of early retirement.

The information on specific teacher role in the SWC is not comprehensive, and is liable to inconsistent categorisation by different schools. Therefore, analysis by individual

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<sup>26</sup> Those in the teachers main pay range were more likely than average to take age retirement, and were also more likely to take ill-health retirement (as described earlier in this section). This is because they were much less likely than other teachers to take other forms of early retirement (other than ill-health).

teaching role should be viewed with caution. In the analysis that was possible, variations were small, although teachers in some specific roles were more likely to take ill-health retirement: heads of department and heads of year (both 4.1%); while there were lower levels of ill-health retirement among peripatetic teachers (2.3%).

*Is there any correlation between the conditions which result in teachers retiring on ill-health grounds or the age at which they do so and the role undertaken? Has this changed over time?*

The section above summarises the findings for ill-health retirement, age and teachers' role/main subject taught. The analysis also examined the medical conditions that resulted in ill-health retirement; this showed that the most common conditions were cancer (23%), mental health conditions (20%), diseases of the nervous system (19%) and musculoskeletal conditions (15%).

However, because of the relatively small number of ill-health retirements (1,952), it is not possible to analyse the correlation between conditions, age and teachers' roles. Similarly, because of the numbers concerned, it is not possible to examine change over time within the full period covered by the analysis (2010-2014).

*Are teachers who undertake teaching roles which are considered to be more physically demanding (e.g. early years/primary school teachers, PE teachers but also could include other teachers with a physical element) significantly more likely to retire early through ill-health compared with other teachers? What is their age profile? How does this differ from wider teaching population/teachers in other roles?*

The sections above have summarised the findings for teaching roles and ill-health retirement, as well as age differences in retirement age. The analysis is not able to provide firm evidence on 'more physically demanding' roles (in so far as these can be defined), although the analysis of PE teachers in secondary schools indicates that they were less likely than other teachers to be working beyond the age of 60, and were more likely to take some form of early retirement. However, they were no more likely than other teachers to take ill-health retirement.

*What can the data tell us about teachers who retire as a result of mental health issues? Which teachers are most likely to retire early on the grounds of mental ill-health? What are their characteristics (personal and school level)? At what age are they likely to retire? How do they differ from those who retire due to physical health problems? How do they differ from the wider teaching population, if at all?*

Among those who retired early due to ill-health, one in five retired because of mental health conditions (20%). In terms of teacher characteristics, certain groups of teachers were more likely to retire because of mental health conditions, as opposed to other types of condition:

- Special school teachers;

- Male teachers; and,
- Teachers working full-time.

The age distribution for teachers retiring early because of mental health conditions was broadly similar to the average for all ill-health retirements, with an average age of 53.

Because of the small number of teachers in the analysis who retired early due to mental health conditions (260), it is not possible to conduct detailed analysis within this group.

*What are the characteristics (i.e. but not limited to a range of school and leadership factors: history of Ofsted grades, leadership turnover, % budget spent on supply, pupil characteristics) of the schools from which teachers retire on ill-health grounds? How do they differ from the general school population (if at all)?*

The project examined the incidence of ill-health retirement according to school-level characteristics, including type of area, setting and sector. By merging the data with government data on pupil characteristics, it was also possible to see that the incidence of ill-health retirement was higher in schools with higher levels of pupil absence, and with higher proportions of pupils eligible for FSM. It was not possible to examine the other school-level characteristics suggested (e.g. history of Ofsted grades, leadership turnover), as this data was not available at the school or teacher level.

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